

**How Organizations can become creative
Workplaces**

positive
transformation
by aestimat 

Final Paper submitted to obtain the
Certification as
Professional of Positive Psychology

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Revised Version

July, 2016

Outline

1. My Motivation	3
2. The Innovator's Current Dilemma	3
2.1. The Road to Innovation.....	4
2.2. The Road to Happiness	5
3. The Problem with Management Hierarchies	6
4. A Few Thoughts on Positive Psychology	7
5. Radical New Organizational Models	8
5.1. Evolutionary Perspective.....	9
5.2. Teal Trademarks	11
5.2.1. Self-Organization.....	11
5.2.2. Purpose.....	12
5.2.3. Wholeness	12
5.3. Most Famous Teal: Holacracy	13
6. The Positive Transformation Framework.....	17
6.1. Start with the Habits	17
6.2. Positive Psychology and Teal go Hand-in-Hand	18
6.3. Preliminaries.....	20
7. Teal Quick Wins in Five Sessions: A Case Study.....	22
8. Outlook.....	32
9. Sources.....	33

1. My Motivation

I never managed people, and hardly gave other people the permission to manage me. I was a difficult employee. Traditional companies are valuable for many reasons, just not for me. Instead, I have always been committed to exploring how work can lead to fulfillment and growth. Recent trends show that I am no longer an outsider: increasing levels of complexity, connectivity and acceleration are changing the economy and the way in which we work. New technologies and volatile consumer behavior are disrupting markets, in a phenomenon known as “digital transformation”.



Source: www.linkedin.com, 2016

The speed of change challenges (not only) fortune 500 companies: yesterday’s tech startups are today’s most innovative global players, changing the way in which we perceive markets, companies and work. In addition, companies without managers, multi-preneurs, freelancers and small startups (people like me) are tangling up the global economy. Today, the key to innovation lies in companies’ creativity, namely their level of adaptability to cope with market volatility. Transformation is the magic word.

Small companies and startups can easily switch to more flexible structures, whereas traditional and large organizations are struggling with digital transformation. For those companies, I have created ‘positive transformation’, as a framework based upon my experience with agile teams, evolutionary organizational models and the achievements of positive psychology.

New evolutionary organizational models are my object of investigation, knowing that I will be far away from best-selling but somehow fulfilled and responding to the purpose that I sense in myself (becoming a best-selling writer may work better with diet books: I just don’t like diets).

2. The Innovator’s Current Dilemma¹

Most companies today strive for innovation, although creative ideas do not simply happen upon command. In today’s accelerated world, they happen through digitally connected social networks.

¹ Christensen, 1997: the original innovator’s dilemma describes the need of organizations to become innovative through flexible structures, while simultaneously providing stability for their existing business.

Organizations must thus create new structures and patterns (and unlearn old ones). The organizational pattern for innovation is “agile”, given that agile organizations are both stable and flexible. To master this paradox, they have structures with a set of core elements and they also create very dynamic elements that can be quickly adapted to new challenges and opportunities.² Only recently, Google re-organized into one stabilizing component - Alphabet - for its core business, while all the other subsidiaries were organized in flexible smaller units, including Google, Calico and many more.

At the same time, many organizations have become a threat to people’s health and well-being, entailing stress, pressure and meaninglessness. Purpose, meaning or flow seem to be found anywhere but in most of today’s workplaces. Nonetheless, purpose alone is *“the most valuable and highest potential segment of the workforce, regardless of industry or role”*³.

The innovator’s dilemma⁴ of today not only lies in aligning innovation with traditional business; rather, companies of today must create workplaces that nourish innovation AND enhance the well-being of their employees.

2.1. The Road to Innovation

What is the input that provides creative and marketable ideas? Today, markets have become *“... too fast, too complex and too networked for any company to have all the answers aside”*⁵. Unpredictability is the “normal” of our time. In a complex environment with only fuzzy goals rather than clear objectives, expertise may be less important than adapting a “beginner’s mindset”: making mistakes, learning fast, and taking corrective action very quickly. Successful organizations will be able to bring good ideas to market by using people’s intellectual and cultural power in a creative way.

Innovative organizations of today need to be proficient in:

- ideation (the process of getting good ideas);
- incubation (nurturing them into an actual business concept); and
- acceleration (bringing them to market with the mainstream business).⁶

Whether ideation, design thinking or human-centered design⁷ are quoted, they all represent processes developing ideas in a highly flexible way, with a strong focus on the client, allowing mistakes and iterations to create solutions that have a market.

² Aghina et al., 2015

³ Blakeman, 2015

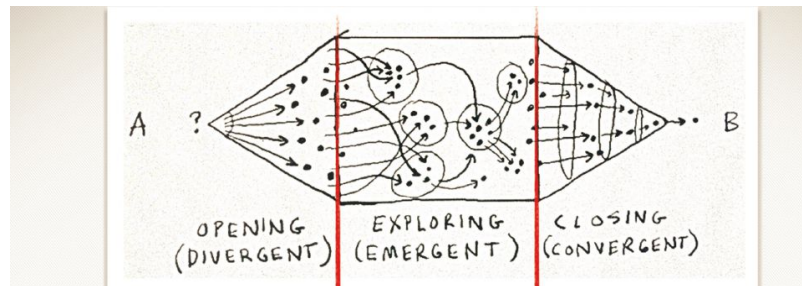
⁴ Christensen, 1997

⁵ Benkler, 2007

⁶ McGrath, 2015

⁷ In 2008, Tim Brown of the design firm ideo wrote “Design Thinking” for *Harvard Business Review*, which explored how thinking like a designer can transform the way in which we develop products, services, processes and strategies.

The process usually has three phases: the first phase opens up on new subjects, requirements or topics coming from internal or external sources, while the second, exploring phase lets people experiment with these requirements. Experimenting happens in iterative procedures, by testing ideas and prototyping them until eventually a so-called minimum viable product can be presented, marking the final, closing phase in which the product or idea can be brought to market. The process follows the principles “play”, “iterate”, “make mistakes” and “learn”!



Source: Gray et al, 2010

All of these principles are habits boosting positive emotions, bearing in mind that being allowed to make mistakes and learn from them can be a very positive experience. Moreover, positive emotions broaden people’s awareness and encourage innovative and exploratory ideas and actions.⁸

Organizational designs will need to be transformed to unfold people’s creative potential.

2.2. The Road to Happiness

Making organizations flexible to react to dynamic challenges, improving the efficiency of work and making people happier requires a change in the way in which we think of work and design workplaces.

“The diffusion of innovation is a social process, based more on psychology and sociology than technology.”⁹ Companies need to innovate, but people need meaning and accomplishment to be creative, both of which are indicators of happiness¹⁰.

This is where positive psychology comes into play: people who are happier at work tend to be more creative and innovative. Positive emotions lead to more unusual thoughts, flexibility, increasing creativity, thinking in broader contexts and greater openness towards new impulses. All these experiences are summed up by the “broaden and build theory”.¹¹

Applying the thoughts, concepts and interventions of positive psychology not only to individuals but also to teams and whole organizations can help to make organizations fit for the future.

⁸ Fredrickson, 2004

⁹ Rogers, 1983

¹⁰ Seligman, 2012

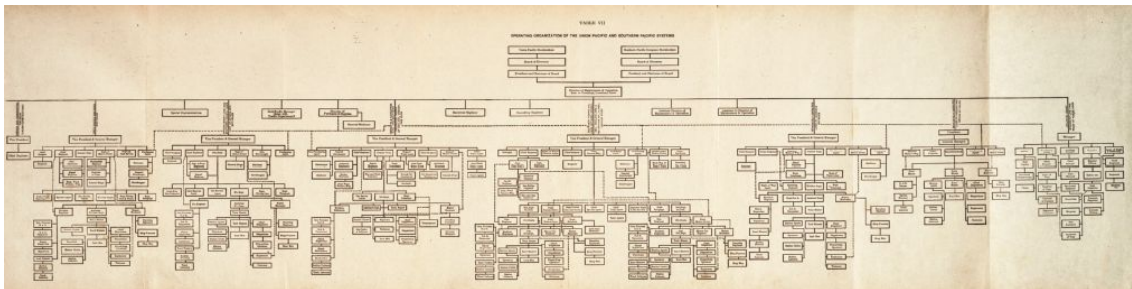
¹¹ Fredrickson, 2004

The road to innovation and the road to happiness both lead in the same direction: people's creativity comes along with their well-being.

Workplaces raising both innovative and soulful cultures require adequate organizational designs.

3. The Problem with Management Hierarchies

In a seminar, I asked attendees to name limitations of today's companies. Their responses included power struggles, unclear objectives, silo-thinking, painful meetings, lack of engagement, micromanagement, difficulty to embrace change, etc., which are altogether not appropriate attributes for organizations to disrupt themselves. By contrast, management hierarchies are rather stopping people from developing creativity, instead making them waste their energy with politics and hidden agendas.



The reasons can be found in their organizational design: *“the tension of our times is that we want our organizations to behave as living systems, but we only know how to treat them as machines”¹² and these machines can only change as quickly as their leaders handle the change.*

With their hierarchical structures, they multiply the effects of employees' negative emotions and very often support frustration, boredom or burnout: mental states that psychologists sum up under the theory of learned helplessness.¹³

“...Successfully adopting a native digital perspective requires mastering a mindset that traditional management culture is both unfamiliar and rather uncomfortable with.”¹⁴ The sources of discomfort are quite system-immanent: they lie in the way in which companies are organized, power is distributed and ideas are drowned, including the way in which people are promoted, rewarded or fired. The conviction that work is unpleasant has created a self-fulfilling prophecy.¹⁵

Well-intended concepts like leadership or workplace engagement are just a drop in the ocean. *“...The failure of the multi-billion leadership industry is that it assumes leadership to be confined to a few people at the top ... Words like ‘management’ and ‘control’ immediately evoke the image of someone in a top*

¹² Wheatley, 1996

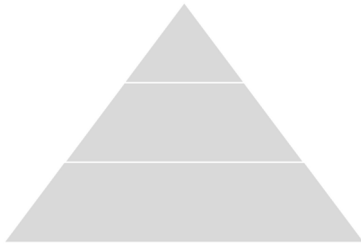
¹³ Seligman, 1975

¹⁴ Hinchliffe, 2016

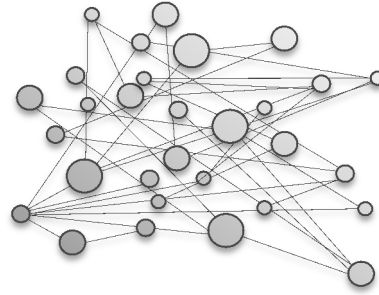
¹⁵ Imperative, 2015

*leadership position. This image is incomplete and misleading.*¹⁶ Indeed, empowerment initiatives or strengths assessments can lead to even further discomfort if applied only selectively in annual performance reviews, while the structural and behavioral patterns remain unchanged.

In addition, recent trends like declining employee engagement and increasing burnout foreshadow how management hierarchies are stretched to their limits.



Management hierarchies work best in steady environments



Complex environments require adaptive organizational systems

The way in which organizations are designed has a remarkable impact on employees' creativity and well-being.

*"As companies strive to become more agile and customer-focused, organizations are shifting their structures from traditional, functional models toward interconnected, flexible teams. More than nine out of ten executives surveyed (92 percent) rate organizational design as a top priority, and nearly half (45 percent) report their companies are either in the middle of a restructuring (39 percent) or planning one (6 percent)."*¹⁷

It is time to design living systems.

4. A Few Thoughts on Positive Psychology

The term "positive psychology" was introduced by Martin Seligman in 1998, with a focus on personal growth rather than pathology, with was hitherto psychologists' prevailing area of interest.

"Build what's strong" instead of "Fix what's wrong"

became a new paradigm in psychology¹⁸, with a focus on looking for personal growth and mental health rather than treating illness.

Positive psychology serves as an umbrella for many topics:

¹⁶ Romme, 2015

¹⁷ Deloitte Human Capital Trends, 2016

¹⁸ Seligman, Csikszentmihalyi, 2000

“Psychology should be able to help document what kind of families result in children who flourish, what work settings support the greatest satisfaction among workers,

... and how our lives can be most worth living....

The field of positive psychology at the subjective level is about valued subjective experience:

- *well-being, contentment, and satisfaction (past),*
- *hope and optimism (future), and*
- *flow and happiness (present).*

At the individual level it is about positive individual traits -- the capacity for love and vocation, courage, interpersonal skill, aesthetic sensibility, perseverance, forgiveness, originality, future-mindedness, spirituality, high talent, and wisdom. At the group level it is about the civic virtues and the institutions that move individuals toward better citizenship: responsibility, nurturance, altruism, civility, moderation, tolerance, and work ethic...

It will also re-orient psychology back to its two neglected missions, making normal people stronger and more productive as well as making high human potential actual.”¹⁹

The fields of application are varied including, positive education, positive health, positive coaching and positive business.

Positive Psychology in Business

Human strengths - and not the absence of weaknesses - are the keys to productivity, resilience, increased job engagement and customer satisfaction. Moreover, the enormous effect of positive emotions in business²⁰ creates a vision of positive psychology playing a major role in the economy within the next years.

Applying positive psychology to single persons or teams can help to establish higher levels of well-being and self-esteem across the entire organization. For instance, it can reduce the fear of change and build up an appreciative communication culture.

5. Radical New Organizational Models

The way in which organizations are designed is fundamental to their success and their employees' well-being. Many tech and internet firms have created flat hierarchies, with cultures allowing them to be adaptive towards market challenges. Indeed, highly flexible companies such as Apple and other internet tycoons are even able to shape market behavior. Nonetheless, there are always one or a few people at the top of these companies who direct the rest of the employees. There is no question that these people are geniuses, with a flexible mindset and an agile and disruptive attitude, but what about all the other companies in the world craving for innovation, as well as the millions of employees still threatened by stress and meaninglessness although working in organizations with so-called flat hierarchies?

¹⁹ Seligman, Csikszentmihalyi, 2000

²⁰ Gallup, 2013

How can companies be organized if their leaders do not have the necessary creative potential and thus are obliged to search for ideas among their colleagues?

Furthermore, how can companies become soulful workplaces? How can companies help introverts, creative minds and people lacking thirst for power – namely the people urgently needed on the road to innovation – to unleash their full creative potential?

I am intrigued by the way in which increasingly more companies take their corporate social responsibility seriously by creating dynamic organizational designs.

Frederic Laloux describes a number of successful organizations “*inspired by the next stage of human consciousness*” that have prompted a radical shift towards evolutionary structures.²¹

5.1. Evolutionary Perspective

A look at the historical evolution of organizational models²² may not be sufficiently scientific, yet it remains a pragmatic approach to demonstrate the cultural paradigms and the way in which the “workforce” has been perceived from early industrialization (red) to today’s era of post-heroic consciousness (teal).

While “Orange” (most of today’s large organizations) with competition and profit orientation still reflect “organizations as machines”, the “Green” model focuses on culture and leadership yet still entails the problematic static and hierarchical structures with their power struggles and hidden agendas.

²¹ Laloux, 2014

²² Laloux refers to the original theory of development stages of humanity, “spiral dynamics” by Clare W. Graves, which also was adopted by Ken Wilber in his “integral theory”.

Exhibit 1: Evolutionary Breakthroughs in Human Collaboration

Color	Description	Guiding Metaphor	Key Breakthroughs	Current Examples
RED	Constant exercise of power by chief to keep foot soldiers in line. Highly reactive, short-term focus. Thrives in chaotic environments.	Wolf pack	<ul style="list-style-type: none"> • Division of labor • Command authority 	<ul style="list-style-type: none"> • Organized crime • Street gangs • Tribal militias
AMBER	Highly formal roles within a hierarchical pyramid. Top-down command and control. Future is repetition of the past.	Army	<ul style="list-style-type: none"> • Formal roles (stable and scalable hierarchies) • Stable, replicable processes (long-term perspectives) 	<ul style="list-style-type: none"> • Catholic Church • Military • Most government organizations (public school systems, police departments)
ORANGE	Goal is to beat competition; achieve profit and growth. Management by objectives (command and control over what, freedom over how).	Machine	<ul style="list-style-type: none"> • Innovation • Accountability • Meritocracy 	<ul style="list-style-type: none"> • Multinational companies • Investment banks • Charter schools
GREEN	Focus on culture and empowerment to boost employee motivation. Stakeholders replace shareholders as primary purpose.	Family	<ul style="list-style-type: none"> • Empowerment • Egalitarian management • Stakeholder model 	Businesses known for idealistic practices (Ben & Jerry's, Southwest Airlines, Starbucks, Zappos)
TEAL	Self-management replaces hierarchical pyramid. Organizations are seen as living entities, oriented toward realizing their potential.	Living organism	<ul style="list-style-type: none"> • Self-management • Wholeness • Evolutionary purpose 	A few pioneering organizations (see "Examples of Teal Management")

Source: Frederic Laloux, *Reinventing Organizations* (Nelson Parker, 2014)

The current stage of human consciousness is represented by “teal”, with an ethic of mutual trust, mindfulness and integrity.

Teal organizations are perceived as living systems designed for high complexity environments, with a soul, an own identity and an evolutionary purpose.

“Teal” represents organizational designs that create a space where people can be authentic and where respect and trust are routine.

The organizational design of “teal” is based upon the idea of self-organized systems.²³ Far away from the “predict and control” paradigm of management hierarchies, teal organizations create a culture around a purpose, a living organism with an energy of its own, where *“innovations can permute into the system”*²⁴.

With a few examples - including the Dutch healthcare organization Buurtzorg - Laloux describes how self-organized companies allow workers to encounter authenticity, community and purpose, thus leading to increased innovation, well-being and productivity.

Laloux goes as far as to predict that a new organizational era is emerging. Indeed, watching discussions in forums on LinkedIn or twitter, I tend to believe that “teal” as a synonym for “self-organization” will soon become mainstream.

5.2. Teal Trademarks

“Teal” is the organizational design framework that enables innovation and people’s well-being. Whether through holacracy or other models, they all share three basic elements:

- purpose;
- wholeness; and
- self-organization.

5.2.1. Self-Organization

A detailed view of self-organization will be provided in the chapter about holacracy. Self-organization guarantees that business-related information is open to all and can float seamlessly across the organization. *“Teal organizations have found the key to operate effectively, even at large scale, with a system based on peer relationships, without the need for either hierarchy or consensus.”*²⁵

Indeed, self-organization is based on rules. One misconception is that rules lead to bureaucracy, whereas the fact is that if organizations want to become highly flexible and agile, they need to implement a set of clear boundaries and rules. Clear rules regulating accountabilities, processes and work give much more freedom to the entire organization.²⁶

Freedom and accountability are two sides of the same coin: self-organization provides the basis for seamless information streams by giving people as much autonomy as possible within defined roles, as well as holding them accountable for their work output. There is transparency about what is done, when and by whom. Furthermore, self-organization creates cultures of responsibilities and responsiveness, where people can develop their own purpose and bring “all who we are”²⁷ to work.

²³ Self organization - or self-management - refers to the way in which evolutionary systems organize themselves. I prefer the term “self-organization”, while others use “self-management”.

²⁴ Laloux, 2015 on the “forevernow” Festival in Berlin

²⁵ Laloux, 2014

²⁶ Robertson, 2015

²⁷ Laloux, 2014

The way in which organizations are designed is shaping organizational culture: self-organization favors people's autonomy and well-being, thus fueling creativity and productivity.

5.2.2. Purpose

Purpose answers the “why” of organizations and individuals.²⁸ There is a relationship between “what we are here to do”, “how we know what we are doing” and “how we do it”.²⁹ In an instable environment, purpose shapes cultures and holds the organization together.

Employees develop a sense to observe how their own purpose resonates with the collective. Some even say that in the long run there are no trade-offs between purpose and profits.³⁰ Studies demonstrate at least that purpose-oriented employees are more successful than others,³¹ as they experience more meaning and fulfillment at work and have stronger relationships. Moreover, purpose-driven organizations tend to be more focused on customer needs.

“... developing purpose-oriented workers is only part of the equation. Building organizations that empower people to embrace purpose orientations drives organizational success, engages communities and boosts the economy”³²

5.2.3. Wholeness

“Organizations have always been places that encourage people to show up with a narrow “professional” self and to show a masculine resolve, to display determination and strength, and to hide doubts and vulnerability. Rationality rules ... while the emotional, intuitive, and spiritual parts of ourselves often feel ... out of place...”³³

Teal organizations are human workplaces where people can bring “all of who they are to work”, whether the emotional, spiritual or even their “darker” sides.

“So far so good, but we'd be naive to think that ‘teal’ wholeness can be achieved by simply introducing a selection of practices such as moments of silence at meetings, storytelling, or bringing your dog to work. ...While these practices are definite enablers for wholeness, there remains many questions such as:

- *How do we understand what wholeness means not just for ourselves, but also for others?*
- *How do we know if our sense of wholeness is shared?*
- *How do we select and evaluate our ‘wholeness’ practices?*
- *How do we find a common language and common points of reference to discuss such a deeply held personal experience?*
- *How do we enable groups and individuals to work through this?”³⁴*

²⁸ Sinek, 2009

²⁹ Caulkin, 2016

³⁰ Laloux, 2014

³¹ Imperative, 2015

³² Imperative, 2015

³³ Laloux, 2014

³⁴ McKeown, 2015

“Teal” organizations are trying to offer a culture of trust and collaboration that leads to an effective level of connection among people.

5.3. Most Famous Teal: Holacracy

“The ... organizing principle of complex adaptive systems is that simple rules guide complex behavior. This notion is completely counterintuitive to conventional wisdom. We usually think that complex structures will work only if we have detailed blueprints or a comprehensive set of rules and regulations. While this is often true for mechanical tasks, it is not the way biology works. In the organic world, the secret to effective execution of complex tasks is that order emerges from the collaborative application of a few simple rules rather than by compliance with a complex set of controls.”³⁵

Agility was first adapted by software departments, applying iterations of production cycles run by self-organized teams to come closer to the users’ needs,³⁶ among other things. As a new organizational framework, holacracy made use of the software industry’s experience and applied the idea and rules of self-organization to the rest of the organization. Holacracy - often mistaken as a “non-hierarchical” and “rigid” model - can be described as an evolutionary organizational framework, organic system or meta-framework³⁷:

“...designed by an evolutionary process”

“... allowing organizations to express a higher purpose”

“... defining hierarchies by the prioritization of work”

“... crushing shadow power struggles”

“... changing the way power works and decisions are made”.....

“Protecting the organizational design from human ego without neglecting the ego”.

Holacracy has been implemented by companies including Zappos, David Allen Company, Springest, Blink labs, Office of the CIO of Washington State and many more. A quick run through its principles follows:³⁸

³⁵ Collins, 2015

³⁶ Parallels can be found in human-centered design and ideation processes.

³⁷ The following bullet points quote Brian Robertson’s statements noted during an online practitioner training, 2015

³⁸ Robertson, 2015

The traditional hierarchy is reaching its limits, but “flat management” alternatives lack the rigor needed to run a business effectively. Holacracy is a third-way: it brings structure and discipline to a peer-to-peer workplace.



Flexible organizational structure

With clear roles and accountabilities



Efficient meeting formats

Geared toward action and eliminating over-analysis



More autonomy to teams and individuals

Individuals solve issues directly without bureaucracy



Unique decision-making process

To continuously evolve the organization's structure.

Source: www.holacracy.org

Evolutionary Organizational Structure: (“Build What’s Strong”):

The underlying “operating system”³⁹ of the organization is highly flexible, with work being processed according to “what needs to get done”⁴⁰, based upon a written constitution containing the organization’s purpose. Roles (and not positions) are grouped into circles. Each role and circle maintains structural autonomy with clear accountabilities and domains of work. This allows collective wisdom to spread and be adapted quickly, whereby change is absorbed efficiently. The system is frequently updated via tensions (see above) in rapid iterations⁴¹ rather than the long and painful re-organizations known within traditional companies.⁴²

Autonomy: Roles Defined Around the Work:

Autonomy is often misunderstood as “do what you like”. Holacracy equals autonomy with clear roles and accountabilities. Everyone can have different roles, each with explicit authorities and accountabilities, which give more flexibility than static job descriptions. One person can hold the roles “accountant”, “internal coach” and “sales support” in three different circles. This would be rather unrealistic in a management hierarchy. Interestingly, it is the roles that obtain authority, as opposed to people or positions.

³⁹ “An operating system (OS) is system software that manages computer hardware and software resources and provides common services for computer programs. The operating system is a component of the system software in a computer system. Application programs usually require an operating system to function.” (Wikipedia)

⁴⁰ Allen, 2002

⁴¹ Again, the influence of software development’s experience with agility and scrum is visible.

⁴² Roberston also quotes the systemic “power to the process” in conjunction with “distributed authority”.

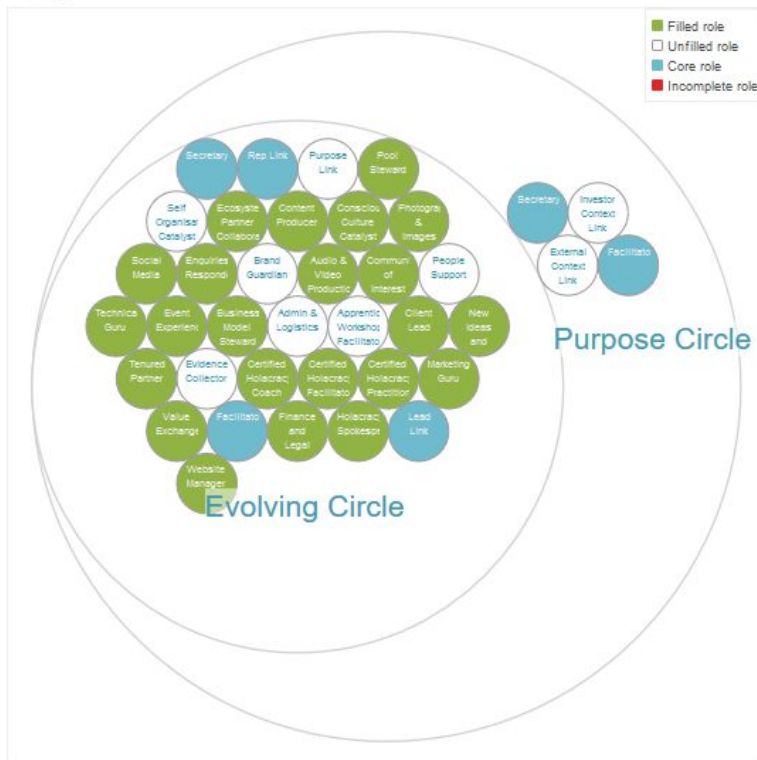
Efficient Meeting Formats and Unique Decision-making Process:

People are expected to process tensions (namely something that anyone can sense must be modified to fulfill their role or circle’s purpose) in a structured and disciplined way. Tensions create proposals, which are processed through a highly structured decision-making process based upon consent rather than consensus.⁴³

Holacracy is enabled by a system of rules that allows order to show up when needed, as a system of rules to achieve order without bosses.

Evolving Organisation

Purpose: Catalysing capacity for conscious evolution in organisations and their ecosystems through holacratic self-organisation



Source: <https://glassfrog.holacracy.org/organizations/194>

There are a few reasons why company leaders are afraid of holacracy:

Willingness to Change Old Habits:

Starting holacracy requires unlearning many habits that worked well in traditional companies. This may be one of the reasons why it is so controversially discussed in the media and naturally rejected by those who have gained authority through the exact habits that holacracy tells them to unlearn. All starting

⁴³ While focusing on consensus often leads to energy-losing, painful meetings, consent-based decisions are made after each raised objection is tested against the role or the organization’s purpose.

with the person at the top stepping back from his/her privileges to give room for distributed authority, where every single employee is bound by the same rules and nobody is above the law.

The Image of Holacracy:

The perception of holacracy is still the “organizational design for low paying startups”. Furthermore, the trouble caused to 20% of the workforce at Zappos - the most famous adopting company to date - during the implementation of holacracy created a quite negative media hype, which did no good to the basic concept of holacracy.

There is no question that top managers and representatives of traditional businesses are still reluctant to consider holacracy as an alternative to traditional management hierarchies.

The ideas connected with holacracy are nonetheless much too pertinent as to easily throw away the concept of an operating system based upon which any type of business can run. My experience with holacracy includes observations featuring effective meetings, a chance for introverts to have a word (I like this one!), a very short time to market for new ideas and a high level of engagement and motivation among employees, to name just a few.

More experience with more companies adopting holacracy will surely shape future discussions of organizational design.

6. The Positive Transformation Framework

Every time that a new idea becomes popular, some people emerge as “evangelists” or “gurus” and preach the word. At the moment, the prevailing evangelists’ opinion is that only startups are able to adopt “teal”, as such organizations are agile per se. Moreover, they suggest that large organizations would be too rigid and thus would soon completely vanish. Is this just another dogma or is it wishful thinking?

I have seen rigidly static, unorganized “flat hierarchy” startups and I have also worked with managers of management hierarchies willing to ring in a new era.

The success of a transformation depends much more on mindsets rather than the company’s age or existing organizational structure.

Who says that traditional organizations would not be able to start to iterate, play, learn and make mistakes? Perhaps a look at the evolution of organizational models can help: an “orange” organization on its way to “green” may be more willingly agile than a startup ruled by a high-handed autocrat. The journey to “teal” may be easily taken by green organizations, namely those that show all the signs of letting traditional hierarchies go but still have difficulties in embracing the full range of “teal”.

The way for organizations to become fully “teal” - with all of its positive and negative implications for managers and co-workers - is best described in “Reinventing Organizations”⁴⁴.

Nonetheless, how can companies that need to master the current innovator’s dilemma – aligning innovation and well-being – but cannot immediately become entirely “teal” due to many reasons - e.g. stakeholders or time restrictions - proceed?

This chapter refers to the adoption of some core “teal” habits by parts of an organization, a single department or so-called lighthouses - e.g. innovation labs or hubs – whereby the difficult role of (middle) managers during the transition can be neglected. Remember the three core “teal” characteristics, self-organization, purpose and wholeness.

If a team wants to become more flexible to create innovative ideas for a long-term project, it is often sufficient to adopt a few principles of self-organization, e.g. adopting roles with clear responsibilities and creating a more disciplined meeting culture. Furthermore, during the transformation process, the external facilitators can observe how purpose and wholeness are growing within the team, offering respective support, e.g. through purpose assessments, etc.

6.1. Start with the Habits

Changing the organizational design or even only parts of it requires a shift in mindsets. Even becoming only partially “teal” means unlearning strategies and behaviors that were useful in management hierarchies in a first step, including⁴⁵:

⁴⁴ Laloux, 2014

- Having power over people. Instead: Letting go of power.
- Searching for consensus, seeing that anyone is buying in to one's ideas. Instead: Accepting consent.
- Telling other people what to do. Instead: Subordinating to a clear decision-making process.
- Being a hero by solving other people's problems. Instead: Subordinating to the boundaries and rules.

It is like exercising: the simple repetition of new habits within new processes will help to change learned strategies and behaviors.

6.2. Positive Psychology and Teal go Hand-in-Hand

In their daily routines, teal organizations not only fuel creativity but also instinctively follow the basics of modern Positive Psychology by enabling people's ability to flourish, namely

*Virtue, Meaning, Resilience and Well-Being.*⁴⁶

Nonetheless, only a few pioneers have abandoned management hierarchies. It is harmful to the economy how the fear of change among corporate leaders does not yet reflect the necessity of change. Change is difficult, of course, and we all know that traditional re-organization projects are time-, resource- and energy-consuming. Achieving a high innovation level and a high level of well-being is difficult with management hierarchies. The traditional change management can thus only heal the symptoms of organizational malaises.

As teal organizations embrace virtue, meaning, resilience and well-being – all indicators of happiness – there is reason to believe that positive psychology and “teal” go hand-in-hand very well in terms of transforming existing organizations into soulful and evolutionary ones.



I wonder whether the combination of interventions of positive psychology and teal components - applied from the very beginning of a transformation process - even multiply the positive effects of both.

⁴⁵ Quotes taken from a discussions during a holacracy practitioner training, 2016

⁴⁶ Wong, 2011

For example, if a company wants to become self-organized, a possible way to introduce self-organization in a first step is to implement dynamic roles for the work to be done. Each team member holds different roles with clear authorities. Positive Psychology comes in the game during the role definition and role-people matching process: focusing on each colleague's strengths by applying strength-boosting interventions not only helps to match the right talent to each role, but also to build up positive emotions and optimism.

Moreover, the example of holacracy points to the idea that the transition from management hierarchy towards "teal" can bear positive effects already at a very early stage: the move to holacracy usually happens in iterative steps, team by team, without holding back the rest of the organization from their work routines.

Accordingly, why not apply trademark parts of "teal" to traditional management hierarchies and fuel them into the organization by making use of interventions of positive psychology to foster positive emotions already in the transition process?

"Positive Transformation"

is a framework of self-organization principles underpinned by interventions of Positive Psychology that can be applied by facilitators and coaches to support organizations in becoming healthy and soulful workplaces in an energy-saving and optimistic way.

The positive transformation framework can be applied to introduce innovation processes to teams or departments, as well as introducing the "full teal" to entire organizations. The case study at the end of the article describes the introduction of some teal trademarks to a department.

How can positive psychology specifically support transformation processes? Remember, a change of mindsets starts with a change of habits. The mind can be trained in self-organization, purpose-orientation and trust, as well as happiness. Examples include but are not limited to:

- The self-determination theory⁴⁷, which enables employees to find a balance between the three basic motivations of "competence" (the need to be effective in dealing with the environment), "relatedness" (the need to have a close, affectionate relationship with others) and "autonomy" (the need to control the course of one's life). Interventions can also reduce learned helplessness.
- Strengths-based interventions. "People who use their strengths every day are six times more likely to be engaged on the job. Teams that focus on their strengths are 12.5% more productive."⁴⁸ Strengths can be assessed through online assessments of Gallup, VIA or R2 profiler,⁴⁹ as well as by using a simple questionnaire. Strengths of individuals and even teams can be further developed with coaching.

⁴⁷ Deci, E., Ryan, R., 2002

⁴⁸ www.gallupstrengthscenter.com

⁴⁹ www.viacharacter.org, <https://assessment.r2profiler.com>

- Interventions to build up resilience and develop strategies for coping.
- Interventions to build up and cultivate optimism.
- Interventions to create a positive communication culture.
- Interventions to nurture social relationships.
- Interventions to increase flow experiences.

The advantages of the positive transformation framework in comparison to the usual re-organization procedures lie in its:

- adaptability towards the needs of each single organization (“only parts of teal” versus “whole teal” covered);
- easy alignment with any self-organizing framework or concept, e.g. “agile” or holacracy;
- iterative implementation mode, while the rest of the organization can do business as usual; and
- potential to multiply happiness.

6.3. Preliminaries

A few preparatory steps have to be undertaken if a transformation to “teal” is to become successful.

Start with a Transformation Readiness Assessment:

Every transformation to “teal” starts with a leader declaring the organizational model to be changed. Before taking the first step into “teal” with any other part of the organization, there are a few things to examine:

- top-level involvement, reflecting the leader’s willingness to change;
- leaders’ willingness to step back and give away authority;
- the organization’s maturity level regarding self-organization; and
- the organization’s stage of consciousness (orange, green, etc.).

Most of the items can be assessed in a face-to-face encounter with representatives of the organization and of course its leader, to assess the maturity level, HolacracyOne’s organization maturity map⁵⁰ may be helpful.

Define Pain Points and Priorities:

Does the organization desire a more flexible and dynamic structure for a team, or does it want rules leading to a more effective meeting culture or experiencing their purpose? Alternatively, does it want to transform into the “full teal”?

Define and Visualize “Goals”

What is a good outcome of a transition and how can we see when we are done? These questions should be discussed with the leader and captured on a whiteboard. Ensure that the leader understands the importance of “learning to learn”: the outcome may possibly vary during the transition, which is why the persons involved need to understand that learning quickly and adapting to a new situation is preferred to perfection.

⁵⁰ <http://www.holacracy.org/resource/self-organization-maturity-map/>

Set Metrics:

Define a rough metric for each defined process outcome - e.g. "satisfaction with the new process" - or long-term metrics like "number of marketed innovations".

Furthermore, set metrics for people's well-being, e.g. measure people's well-being with the subjective happiness scale.⁵¹

Define a Pilot:

Pick out one team or department: choosing only one team at the start increases the probability of attracting followers in the organization once the transition is successful.

Coach the team lead on expectations and the implications of change. Kick-off with the team and team lead. Immediately start with interventions of positive psychology to raise optimism and unleash creative potential.

Set up regular team workshops and selectively coach individuals and the team lead.

⁵¹ Lyubomirsky, 2007

7. Teal Quick Wins in Five Sessions: A Case Study⁵²

Earlier this year, an experienced innovation professional and myself were asked to help an innovation department of a large international company to become more flexible and create an innovation process.

The very new department was created as a pilot team of twelve colleagues - most of whom came from different hierarchy levels and had skills from different departments of the company - as well as a few newly hired experts. Many unclear expectations of top management (“we need a mobile strategy”, “let’s see what our young colleagues’ creativity can bring us”) in combination with a high number of short-term objectives (“please produce an app”, “align with marketing!”) were to be handled. The team felt a pressure to quickly deliver results.

The team lead had to master the paradox of representing her department within the management hierarchy, being the spokesperson for the team across the rest of the organization and simultaneously enabling collaboration and flexibility at eye-level within the team to quickly create innovative ideas.

The team was overwhelmed with work, controversial expectations and unclear objectives.

Clarification of Goals for the Assignment:

Before starting with the innovation process, we addressed two relevant pain points:

- Lack of purpose and unclear expectations of stakeholders (the individual and collective purpose sessions are mentioned here for completeness, they took two days of workshops and fill another case study).
- The paradox of “agile within a management hierarchy”, whereby I would describe the stage of consciousness of the latter as “orange to green”: the team had to learn new habits for their new task AND not fully dismiss the old ones for the communication with their stakeholders.

Our Approach: Introducing Self-Organization at the Process Level

We defined our consulting goals as follows:

- enable the individuals to work as a team;
- define an innovation process that fits to their needs;
- enable the team to master the process quickly; and
- coaching the team lead on her role.

We scheduled five sessions - one per day - starting with the elaboration of an innovation process on day one, followed one week later by the definition of tasks on day two.

On the next day, we proceeded with the assignment of roles to the team members on day three.

A week later, on day four, we let the team experience their roles by giving them a “problem” that they had to solve while applying their roles within the newly designed innovation process.

⁵² The described procedure results of my co-operation with venn GmbH

27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

After another two weeks, on day five we returned to discuss experiences and apply modifications to the process.

During our assignment, the team lead and I scheduled individual coaching sessions in which we reflected upon the team's progress and her own role during the transition.

Here are some details:

Day 1: Develop an Innovation Process

As the team was unexperienced with innovation processes, we decided to present them best practices of design companies and startups. We subsequently asked for their specifics in the opening phase, the work that they considered to be done in the exploring and closing phase. Three work groups were assigned to discuss and collect the work to be done in each phase of the process and list the work tasks specified during the discussion. The teams then presented and discussed their results, before making modifications to the first draft of their innovation process.

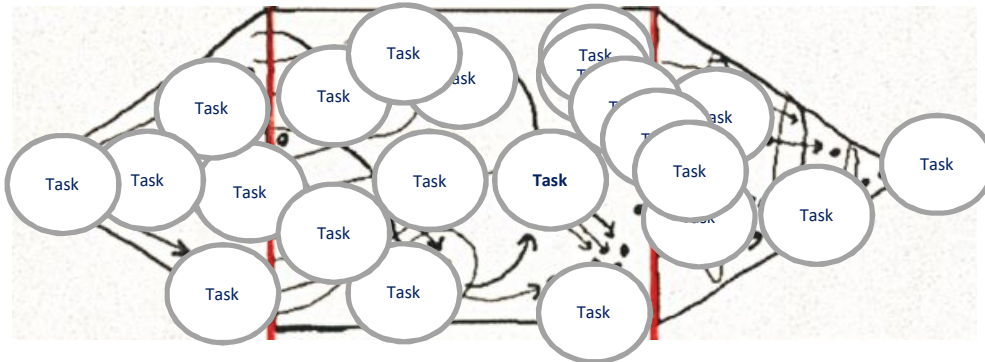
We observed that the lack of clear goals threatened discouraging members of the team. Therefore, we applied two interventions, which we instructed as 20-minute discussions in smaller groups of three colleagues:

- to change perspectives: “what could be positive about not having a clear goal?”; and
- to build up optimism: “what have we already build up, and how could we use this experience now?”

The results were encouraging, as reflected by one statement: “not having a goal gives us autonomy of setting our own goals”. Indeed, we were surprised about the frequent mentions of achievements that they recalled, while they were also surprised.

The statements were noted on a board so that the team was reminded of their achievements every time they looked at it.

At the end of day one, we had created an adaptive innovation process with the three original phases and many team-specific tasks within the phases.



It contained a number of already-defined smaller processes during opening, exploring and closing phase, each with a specification of inputs, work tasks and outputs. Many of them were not yet fully defined and we marked those that needed further refinement. It was crucial for the success of our workshop that the team understood that there was no rush to be 100% perfect in identifying all tasks; rather, it was essential to learn to build a process that fitted to them.

Interventions: presentation of best practices, solution-focused discussions, change of perspective to raise optimism and activate the team’s resources. My intention was to take away pressure from the team and help them to build up trust in their own process.

Experience: the team entered a working mode very quickly and they experienced that they could trust the process. Even if the innovation process was not yet fully defined, they could rely on their experience

and the experience of professionals (us). Every requirement and every missing requirement (“not yet defined”) of the process was noted whereby the team obtained a clear overview of the work status and gained confidence over their new process.

Day 2: Task Definition

To achieve an agile innovation process, we planned to assign the work to be done to a number of to-be specified roles inspired by holacracy. Our goal was to have each person holding more than one role within the process, whereby everyone was able to switch from one role to another during the process when necessary. The role concept allows more flexibility than static job descriptions.

To prepare this, we took the preliminary list of work tasks captured on day one and asked the team to define all the missing work tasks as best as they could.

Unclear goals and the lack of a clear purpose again produced insecurity about the specifics of the product or service to be delivered by the innovation process. The more and greater diversity of products that would fall off the process at the end, the more different work tasks and procedures were to be taken in account. We thus asked the team to name a few typical products or services that they could imagine.

We captured five product types and subsequently asked the team to split up in the respective five groups to work out specific tasks and domains (work areas) for each task in all the phases of their previously defined innovation process.

After the presentation of each task list, we let the groups assemble work tasks into work bundles. Each bundle had to contain a number of coherent work tasks. Many of the listed tasks were already work bundles - e.g. software development or data analysis - while others still had the characteristics of a one-step action.



Sales role
Sales preparation
Connect to prospect
Collecting business opportunities

Analyst role
Designing business model

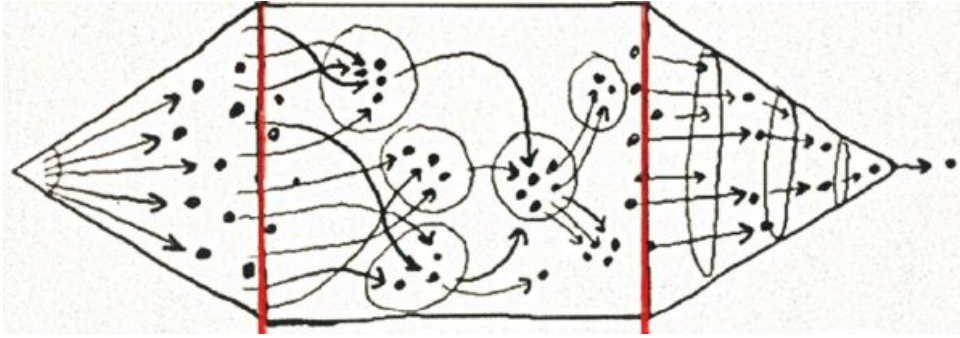
Software development role

Product owner role
Company communication role
Stakeholder check
....

The results of the five groups were listed on a board. A discussion of the different work bundles in the plenum led to a prioritization and short designation of bundles, which would later become "roles" of one unique innovation process.

Again, we asked them not to think about being too precise or academic, bearing in mind that the process could be completed and modified according to their needs at any time in the future.

At the end, all work bundles covering the whole innovation process were presented, including those not yet fully described. The team's homework for the next session was to describe the missing work tasks and bundles urgently needed to start the innovation process.



Phase 1	Phase 2	Phase 3
Company Communication	AnalystTbd
Research	ResearchTbd
Pre-SalesTbd	Marketing
Client Contact	Product Owner	PR
Etc.	Tester	Storytelling
Etc.	Developer	Delivery
.....Tbd	Designer	Etc.
.....Tbd	Data AnalystTbd
.....Tbd	Etc.Tbd
.....TbdTbdTbd
External Communication	External Communication	External Communication

Experience: although the team's purpose was not yet shaped, they were able to define their work, which brought them closer to their purpose. I discovered this by looking at my notes, which featured many reoccurring words, sentences or statements, e.g. "we want to be the design driven part of our company" or "this is the way we do things here".

Interventions: group exercises and discussions, as well as homework. With the role concept, we prepared the team to acquire new habits. Again, it was crucial to ensure that the whole team could trust the process.

We also started to listen to what people said during discussions. "This is how we want to do our job" or "I don't think we ever will focus on product xy" were early indicators for a common yet unspecified purpose.

Day 3: Role Assignment

The results of the previous exercise - including the homework - were again presented on a board. In the final and most complex step, we had to assign roles to people, whereby each person could obtain one or more roles.

We started with a strength-boosting intervention, whereby we formed three teams and let them carry out interviews with pre-defined questions, starting with:

- “What in your daily work is very easy for you, for which you do not even need to reflect much when doing it?”

Proceeding to:

- “For what kind of problem or questions do your colleagues contact you because they know that you can help them?”

And eventually:

- “What are the strengths that you can derive from this observation?”

When we asked the teams to come back to the plenum, we did not collect the results of this exercise.

We then showed the list of work bundles – now roles, which were already mostly assigned to different areas within the innovation process - and asked to assign roles to people. We did this in an election process borrowed from holacracy’ s integrative election process.

Starting with the first role on the list, we asked each team member to nominate whomever they believed the best fit for the role. One could also abstain from nominating a colleague. With the strengths assessment carried out before this step, everyone already had an idea of the specific work bundles or roles to which they could fit, so we reminded them that it was perfectly acceptable to nominate themselves for a role. During the proposal process, we did not allow the rest of the team to make any comments.

Roles	Nominees
<i>Sales Role</i>	<i>John, Paul</i>
<i>Analyst Role</i>	<i>George, Paul</i>
<i>SW dev. Role</i>	<i>Ringo; Paul</i>
<i>Product owner</i>	<i>Thomas</i>
<i>Comp. communication</i>	
<i>Role</i>	<i>Eva</i>
<i>External communication</i>	
<i>Role</i>	<i>Nina, Nicole</i>
...	

After the nomination round, we listed all the nominees for each role and subsequently asked one by one those who voted for the respective nominee (or themselves) to give the reasons for their choice.

Again, we did not allow any comments from the rest of the team. Interestingly, among 25 of 30 roles for 15 team members, common sense almost entirely prevailed, with minimal variations in nominations for a specific role.

After the last round, each team member was given the opportunity to change their nomination and explain the reasons.

Roles	Nominees
<i>Sales Role</i>	<i>John (1), Paul (14)</i>
<i>Analyst Role</i>	<i>George (15)</i>
<i>SW dev. Role</i>	<i>Ringo (13), Paul (2)</i>
<i>Product owner</i>	<i>Thomas (15)</i>
<i>Comp. communication Role</i>	<i>Eva (15)</i>
<i>External communication Role</i>	<i>Nina (3), Nicole (12)</i>
...	

In the next round, we asked the participants to vote for each nominee and role and listed the results on the board. We then counted the number of proposals per nominee and elected the team member with the highest number of nominations for each role. In case of a tie, we proposed one of the nominees ourselves.

The duration of the election process of course depends on the number of roles and participants,

although the election process guides teams very strictly towards a clear decision. The whole election process took us only a few hours.

We experimented with the team's purpose by giving a homework, which comprised writing down each role's purpose and the previously captured work tasks and domains.

Experience: the strengths-based exercise brought a light and playful touch into the very demanding task, whereby the team became so full of energy and positive emotions that the following role assignment became a minor challenge.

With the chosen type of election process during the role assignment, we ensured not only that the roles were filled by the right people, but also that the assignment itself became an instructive and exciting experience, during which nobody felt passed over.

Interventions: strengths assessment and a light variant of holacracy's election process.⁵³ On day 3, we focused on making new habits work, namely a "new way of doing things". Experiencing a common understanding of "what we do" and "what we don't want to do" was clearly fostered optimism among the team.

Day 3 was a quite intensive day, as well as being the most energy-boosting day. One could feel the energy in the room when the roles in the process became increasingly clear.

⁵³ Holacracy Constitution, 2016

Day 4: Living the Process

Day 4 started early for us, as we designed the floor with labeled cards, marking the innovation process and its stages. We also prepared smaller cards labeled with every single work task and another type of cards naming the different domains or areas of work for each role. The last group of cards was dedicated to the specific output of each role and process, although it was not yet labeled.

At the start, we introduced the process and asked the team to gather their “roles”, “tasks”, and “domains”, before giving the team a problem to solve. We prepared in advance a current real problem that the team was to solve. The team agreed to work on the real-life topic, namely developing a mobile concept for the company.

The “design a mobile concept for the company’s area xy” requirement was sent into the process and we asked the role holder responsible for accepting requirements to stand up and go to the place in the room that was designed for this step in the process. The role holder explained the tasks she was going to perform and the output created by the task. Subsequently, we proceeded with the next step in the process and the next role.

During this exercise, it was crucial that not every single role holder had to step into the process, but only those roles necessary to run the innovation process for this type of task. Again, we reminded the team not to try to be perfect, but rather to playfully gain an insight into the process and the flexibility of the role concept. During the process, it was always necessary that team members switched from one of their roles to another in another phase of the process. A team member could have the role of a “researcher” in the opening phase and then another role as a “tester” in the exploring phase. Our goal was to make the team run through the process as many times as possible and write down on their cards the specific outputs of the main process steps.

Experience: the team was able to work on a real-life topic (which was even going to market a few weeks later!) on day 4. The team realized that perfection and planning was not as strongly required as playing and learning. Moreover, yet another experience from the simulation was that clear rules and boundaries give sufficient freedom and authority to work independently within the respective roles.

Given this insight, we gave them some more homework:

- Sensing the purpose of their roles within one process run through in practice (we had scheduled purpose assessments for the team as a follow-up to this workshop) by reflecting upon their role’s individual contribution to a potential “overall” purpose (which was not yet defined).
- Creating an overview on a white board, which allows localizing all the relevant work items (with the responsible role for the work item attached) for each process run through, selected into the phases “to do”, “in progress” and “done”. This not only gave the team an overview of their status, but also allowed them to adopt the process perspective.

Interventions: systemic constellation to make the team experience their new processes and roles. The more the process was shaped, the less we had to explain single steps of the process and the more time that we had to focus on observing and asking questions to bring the team’s purpose forward.

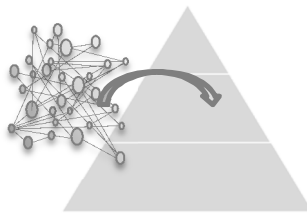
Day 5: Experiences and Modifications

After two weeks, we joined the team and discussed their experience with the new innovation process and roles.

Further clarifications on roles, tasks and outputs were discussed and adopted.

Coaching the Team Lead

In ongoing individual coaching sessions, I helped the team lead to reflect upon her role as a team member within the process, as a leader during the transition phase and how to balance her two almost conflicting roles as a “member of a self-organized team” and “manager in a corporate management hierarchy”.



We started with the first two coaching sessions before the team workshops and continued to have at least one session per week during the workshop phase.

It was an exciting experience to observe the individuals developing from an insecure group of people with unclear goals to a powerful team with clear roles and responsibilities, ready to work on real-life problems. The energizing effect of using people’s individual strengths during the workshop cannot be overestimated.

We made use of the positive transformation framework, which provided a fresh impetus on the department’s way to innovation and well-being through the combination of:

- a highly adaptive and innovation process;
- selected interventions of positive psychology; and
- and selected teal components (roles, purpose, election process).

8. Outlook

At the beginning of my journey to “positive transformation” when I started the basic trainings in positive psychology, I undervalued positive psychology as a “support” to transform companies from management hierarchies to “teal”. The more that I experienced teal organizations in practice, the more that I enjoyed the energy-boosting effects that I was able to create among my clients with the help of positive psychology. Finally, with the experience of a five-day holacracy practitioner training, I became convinced that positive psychology and “teal” are both powerful approaches of equal rank - one psychological, the other organizational - to create and multiply creativity, productivity and happiness at work.

The positive transformation journey with its iterative approach is not only supportive to companies and teams on their way to self-organization; moreover, it is also an experience of learning, fun and growth. I hope that I can contribute towards making transformation a positive experience.

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