Thought Leadership at Henley Business School Africa:

Innovations, Provocations, and Explanations

A white paper series based on groundbreaking thought leadership
Ex Africa semper aliquid novi

In sync – personally, professionally, strategically

Dr Julian Day | Malcolm Ferguson | Barry van Zyl

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Finding flow in life, leadership and complex collaboration

In 2015, when I named internationally recognised drummer Mr Barry van Zyl the recipient of the Henley Business School Africa Dean's Scholarship, I was particularly taken by his vision of nurturing and developing creative talent in South Africa in a structured and innovative way. Barry opened my eyes to the fact that countries like France, Canada, and Australia do not just leave their creatives to struggle without the skills to forge successful businesses and brands; they educate and mentor them to bring them into the economy. South Africa, regrettably, does not.

Less than a decade later, Barry has been true to his vision of infusing creativity into the business world. Flexing his creative strategist muscle, alongside a burgeoning global reputation as a facilitator and educator of note, Barry has produced a white paper that asks leaders in the often-limited business sphere to embrace more than balance sheets and strategic plans. He draws on neuroscience, physics, sociology, personal development, and a growing appreciation for human-centric interactions to make a case for resonance.

Any business that operated through the COVID-19 pandemic will appreciate that 'business as usual' is a thing of the past. Alongside remote working, digital acceleration, and the breakdown of rigid management structures is a blooming awareness that, as Barry put it, human beings are not just 'cogs in a machine or bytes in a code'. The ICE framework he proposes in his white paper, From rigidity to resonance, is a timely reminder of our place in the world and how best to achieve the harmony every system needs to operate in sync.

Disclaimer

Aligned with our mission, 'we build the people who build the businesses that build Africa', we facilitate open, multi-perspective conversations and the generation of thought leadership pieces, such as this white paper. However, the views expressed in this white paper are held by the author and not necessarily held by Henley Business School Africa.

While Barry's white paper takes a personal development view of being 'in sync', Dr Julian Day applies his expertise in systems thinking and strategy to the art of shepherding a project from conception to execution by using effective collaboration. After all, he argued: 'If projects are the engine rooms of our organisations, can we use the theory of collaborative projects to diagnose why there is persistent project failure so that we know how to improve organisational effectiveness?'

In light of his information technology background, Julian's focus may have particular applicability to the dynamic tech world, but his insights add value across industries and organisations. Just like Barry's resonance focus, Julian's white paper, Deliberate collaboration, puts the human being at the heart of effective communication – and his use of musical metaphors and descriptions adds a charming layer of depth.

Last, but by no means least, Mr Malcolm Ferguson completes this trio of white papers, with their shared theme of being in tune with ourselves and with others. Malcolm takes us back to the big-picture thinking for which business schools are renowned. Nevertheless, Malcolm's white paper, From strategy to playbook, is more than just a treatise on the importance of having a strategy document; this we already know. What Malcolm offers in his CAFE framework is a way to turn your company strategy into 'practical tactics that can be translated into moments of brilliance in the heat of the moment because everyone on the team can read the game and knows which part to play'.

I hope that in reading these white papers, you see ways to achieve a dynamic of flow, resonance, and collaborative accomplishment in your own life and organisation.

Dean Jonathan Foster-Pedley

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From rigidity to
reso-
nance

Barry van Zyl

Internationally recognised
drummer, creative strategist and
educator, MBA Henley Business
School Africa (recipient of the
Dean's Scholarship in 2015)

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Personal development is a critical aspect of talent management and human wellness made increasingly important by technology driven information overload, and the growing pace of climate change and resource scarcity. So too is the ability to apply a multi-perspective understanding to human interactions and our place in the world. Resonance offers a unique way of looking at the wealth of existing theories and insights into self-development in the spheres of rhythm, neuroscience, physics, and sociology, while also countering the limiting effect of resistance to change or rigidity. Resonance is a lived approach that heightens self-awareness in an uncertain world by applying a fresh lens that taps into nature, universal rhythm, and innate human behaviour.

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Abstract

Groove is a state of flow that is truly universal. Groove is achieved when the world is in sync and in resonance with itself. A team can be in the groove. Moreover, an inventor can be in the groove, or a surfer riding a perfect wave might feel this sense of connection. While being in the groove may feel like an intangible concept, the pattern and process can be understood and harnessed by applying the *ICE framework*, which comprises three interlinked layers: *Individual, Community,* and *Environment*. The terms used to describe this model are deliberately linked to the language of music, to highlight the connection and natural rhythm we associate with a free-flowing jazz quartet, the flow of a Nigerian percussion ensemble or the energy of a Cuban rumba band in full flight.

The ICE framework is best envisaged by looking down on a cymbal that, when struck, vibrates across the centre, the midway, and the edge of the instrument. A perfect strike radiates a sound that resonates within us at a deep and primal level.

Introduction

People can learn to be fluid and adaptable, just like water. This creates a state of resonance. Alternatively, people can be rigid and unmovable like a piece of iron – a state of resistance or rigidity. How we exist and how we interact with others within our environment is a deliberate choice that has profound implications for our productivity, creativity, wellness, and state of mind. The one extreme builds fear and blinkered thinking, while the other promotes curiosity, open-mindedness, and innovation.

Using the innate language of natural music – and drawing on our implicit ability to tap into a deeply harmonious 'groove' state in the manner achieved by intuitive juju musicians in Nigeria, Venda drummers in South Africa or conga players in Puerto Rico – it is possible to demonstrate how human rhythms can achieve a resonance that goes beyond the tightly bound, metronomically perfect music of the Western world. Efrain Toro (cited in Drum Channel, 2021), one of the world's authorities on rhythm, described the flow or optimal experience achieved by natural musicians as being 'void of straightjackets.... They can move with a musical sound and pulse, which we usually refer to as rhythm … yet studied musicians can't do that'.

Natural music is a form of expression that embraces the notion of improvisation and agility and, when harnessed effectively, can serve as a valuable tool in the journey towards personal and organisational harmony. The great singer-songwriter Joan Armatrading, who penned and performed the song 'Natural rhythm' in 2021, is a perfect example of resonance in action. With her unique and distinct voice and guitar-playing style, Armatrading injects soul into all she does. Nothing Armatrading does jars in a way that we are accustomed to, or expect. It is truly authentic and in sync with the world. This defines the state of 'groove'.
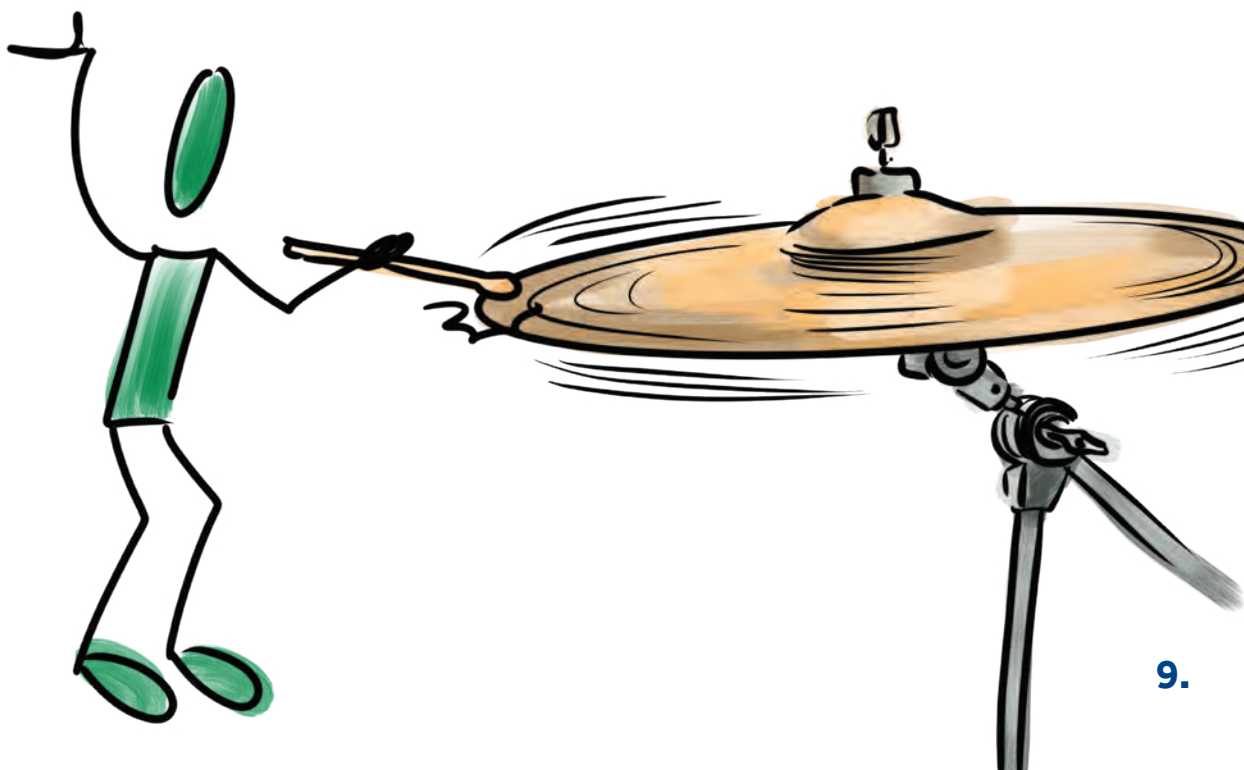
The predicament

Even before the game-changing events of 2020 and the global pandemic, many people were at odds with the changes impacting the world (Berinato, 2020). Pain points included fast-paced digital changes to the disrupted rise of the knowledge economy (World Economic Forum, 2020), as well as increased global nationalism and conflict (Repucci and Slipowitz, 2021). As a foil to the dominance of institutional and organisational rigidity built into increasingly outdated Industrial Revolution-style structures (Uhl-Bien et al., 2007), alongside

rising levels of burnout and feeling overwhelmed by the rate of change, increased attention is now being paid to the innate human abilities needed to navigate a changing world, including creativity, empathy, natural improvisation, and adaptability (Hagel et al., 2019).

Many organisations and individuals that were able to align with evolving human and systemic vibrations found a new lease of life (Clift and Court, 2020), despite the pandemic. However, statistics from the World Health Organization (2022) show a significant 25% increase in the 'global prevalence of anxiety and depression', which have been linked to stressors like loneliness, bereavement, financial worries, and exhaustion. This human response draws attention to the human cost of a changing world and how out of sync we are with these widespread changes.

Therefore, it is unsurprising that personal wellness and self-development have become pertinent buzzwords that speak to people's individual understanding of their rhythms and cycles. Considerations, such as sleep, nutrition, and exercise, are now firmly on the radar, alongside an emerging awareness that these core ingredients are essential for all beings living in a human skin (Newsom, 2022).

At an organisational and group level, this sense of being overwhelmed by the unpredictability of events is directly linked to the work-at-home, life-at-work conundrum (Crosbie and Moore, 2004). This paradox is driving human talent professionals and corporate leaders alike to consider how best to align an organisation's strategic resonance with that of the teams and individuals in its ranks.

Rhythms, timing, and chronobiology

Chronobiology is a robust field of research into biological systems that spans disciplines from biology and medicine to psychology, and delves into the 'master biological clock' or circadian rhythm that 'controls daily rhythms', such as psychomotor functions, mood, and our sleep-activity cycles (Çalıyurt, 2017: 514). Moreover, chronobiology is the underpinning rigour behind the inner, Individual circle of *the ICE framework.*

In 2015, *the Harvard Business Review* published an article by Christopher M. Barnes that explained how each person's internal body clock, chronobiology or circadian rhythm was impacted when they were at their most productive, alert, energetic, and creative. Author and commentator Daniel H. Pink (2018) categorised the bulk of humanity into three groups: larks (i.e., morning people), owls (i.e., night-time people), and so-called third birds (i.e., people who fall in the middle). Depending on an individual's chronotype, or natural rhythm, certain tasks might be better tackled at different times of the day. For instance, a lark is naturally equipped to make decisions in the early morning, while an owl should focus on decision-making in the late afternoon or evening, and a third bird either early morning or mid-morning (Pink, 2018).

According to Pink (2018: 41), 'Simply knowing that you're operating at a sub-optimal time can be helpful because you can correct for your chronotype in small but powerful ways'. He noted that the world is largely configured to suit the rhythms of larks and third birds, and not the owls.

The problem with this compartmentalised approach is that coaxing creativity out of owls first thing in the morning will be a challenge and a waste of their energy. Similarly, expecting larks to ideate with flair late in the evening will not yield positive results, since their natural timing processes are not in sync with this sort of output. Conversely, if innate chronobiology – the natural imprint that likely stays with us for life – is aligned with demand for high-intensity creative work, then productivity goes off the radar. The simplified view of the incredible body of work around chronobiology is that if you can work to your strengths and recognise your weaknesses by factoring in natural energy level fluctuations, it can change your life.
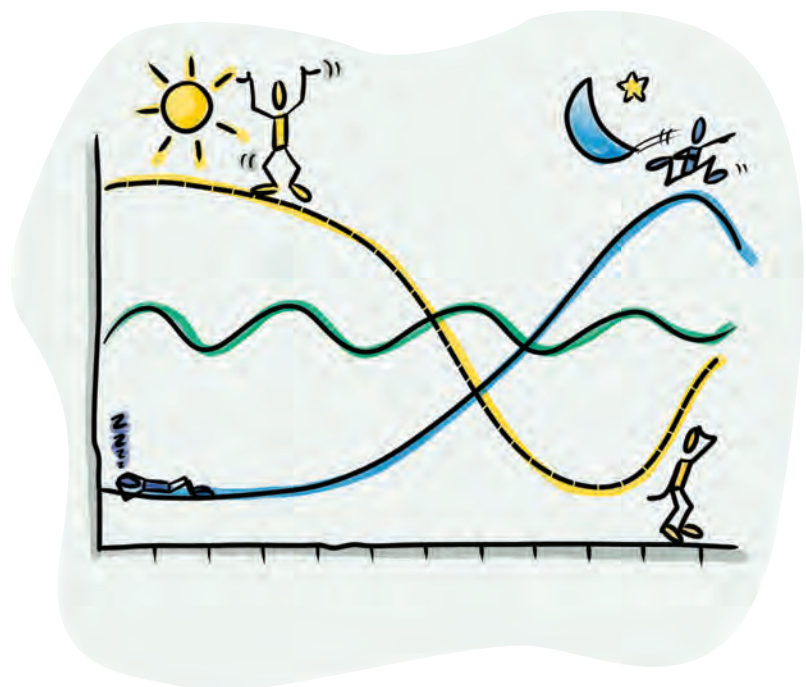
Adopting a new way of working

Since the late 1960s, accelerating through the 1990s, the world has been morphing from a manufacturing structure to a 'knowledge economy' (Zapp, 2022). This transition has brought with it new approaches to work that aim to align work time and space with individual preferences to increase well-being as well as productivity. Flexitime, the gig economy, and working remotely are examples of this paradigm shift (Hasija et al., 2020). Silicon Valley's tech giants have been active in creating flexible work environments to create the best conditions for success in the innovation race (English-Lueck and Avery, 2017). However, this more autonomous and less rigid environment also adds new pressures. Lack of boundaries or clear expectations and increased uncertainty are examples of factors contributing to an overwhelming sense of burnout (Haas, 2019).

Intellectually, many of us might have a theoretical understanding of these shifts, but looking at it from the perspective of rhythm and resonance is new. This thinking requires us to step away from preconceived, manufacture-era views of human beings as cogs in a machine or bytes in a code, and broaden our thinking to view people as part of a changing universe where personal rhythm is impacted by and supportive of the many individual, group, and environmental rhythms around us.

Where does resonance fit in?

In neuroscience, resonance talks to the patterns of 'synchronization, harmonization, vibrations' (Hunt and Schooler, 2019: 1) that form part of the living consciousness. Increasingly, researchers like the late physicist Richard Feynman, himself a passionate drummer, worked to understand how the natural resonance of all things can combine to create a shared resonance (Hunt and Schooler, 2019).

Mathematician Steven Strogatz (2004) described large schools of fish moving in flow with one another, which is achieved by a singular focus rooted in absolute present time. This is another way of describing resonance. Feynman (cited in Tantillo, 2019) colourfully described the same phenomenon as the 'jigglings and wigglings of atoms' in an object when movement was introduced, using the example of water perfectly moulding around a submerged hand.

Psychologist Daniel Goleman (2005) referred to non-verbal communication when observing certain people in conversation (on video with the audio muted) moving together in perfect synchronicity, as an indication of 'flow' or hyper-present time. Martial arts expert Bruce Lee developed his 'be like water' strategy (McBride, 2013) for reacting to opponents as a path to resonance and flow.

The notion of 'flow' was first introduced in the 1970s by Hungarian psychologist and academic Mihaly Csikszentmihalyi as a mental state characterised by energised focus, joy, and purpose (Csikszentmihalyi, 2009; Elhanafi, 2019). This was a state that psychologist Doug Newburg would go on to term 'resonance' in his resonance performance model that focused on the process through which high-calibre performers became experts in their field (Newburg et al., 2002).

Toro, the acclaimed educator, drummer, and thinker, prefers the concept of groove to the more common reference to flow when he describes the deep musical state of resonance, which can be applied to a great surfer riding the waves, or Lionel Messi making magic on the soccer pitch or a team of developers in a design sprint for a powerful new app. Toro once described this state as:

Non-pattern, non-technical, just pure harmonic groove in essence. It is the way with natural musicians and humans that find their nature to do things at this level just like Einstein or DaVinci or Mandela and Angelou and many others.[1]

Being in the groove does not imply perfection. Nevertheless, it does refer to a state in which a group of individuals are irrefutably in sync. At a more personal level, resonance can be harnessed to change how we see ourselves, how we understand the world, and how to find our best fit in the world. Viewed from a sociological lens, resonance aims to improve personal performance by studying our unique internal rhythms and the cycles and trends – big and small – that shape our external environment.

Resonance uses physics, biology, psychology, and sociology to achieve synchronicity in ourselves, with others, and within our world. According to sociologist Hartmut Rosa, who focused on the notion that resonance was the interplay between the individual and the world, resonance is a response relationship in which 'the subject and world touch and transform each other' (Kappler et al., 2018: 79).

From a human development perspective, resonance is an easy-to-understand and instantly useable process with the potential to unlock dormant abilities. Unlike other performance-building programmes, by understanding the three levels of resonance outlined in *the ICE framework*, it is possible to find practical and interactive ways to encourage greater resonance between teams of high performers, be they musicians, sporting professionals, entrepreneurs, creatives or corporates. The practical process of helping resonance to flow starts with the elements that make up the individual (physical, mental, and spiritual), and then reverberates through each subsequent layer of resonance with the environment, from the micro to the macro.

[1] Efrain Toro (personal communication, 28 October 2000)
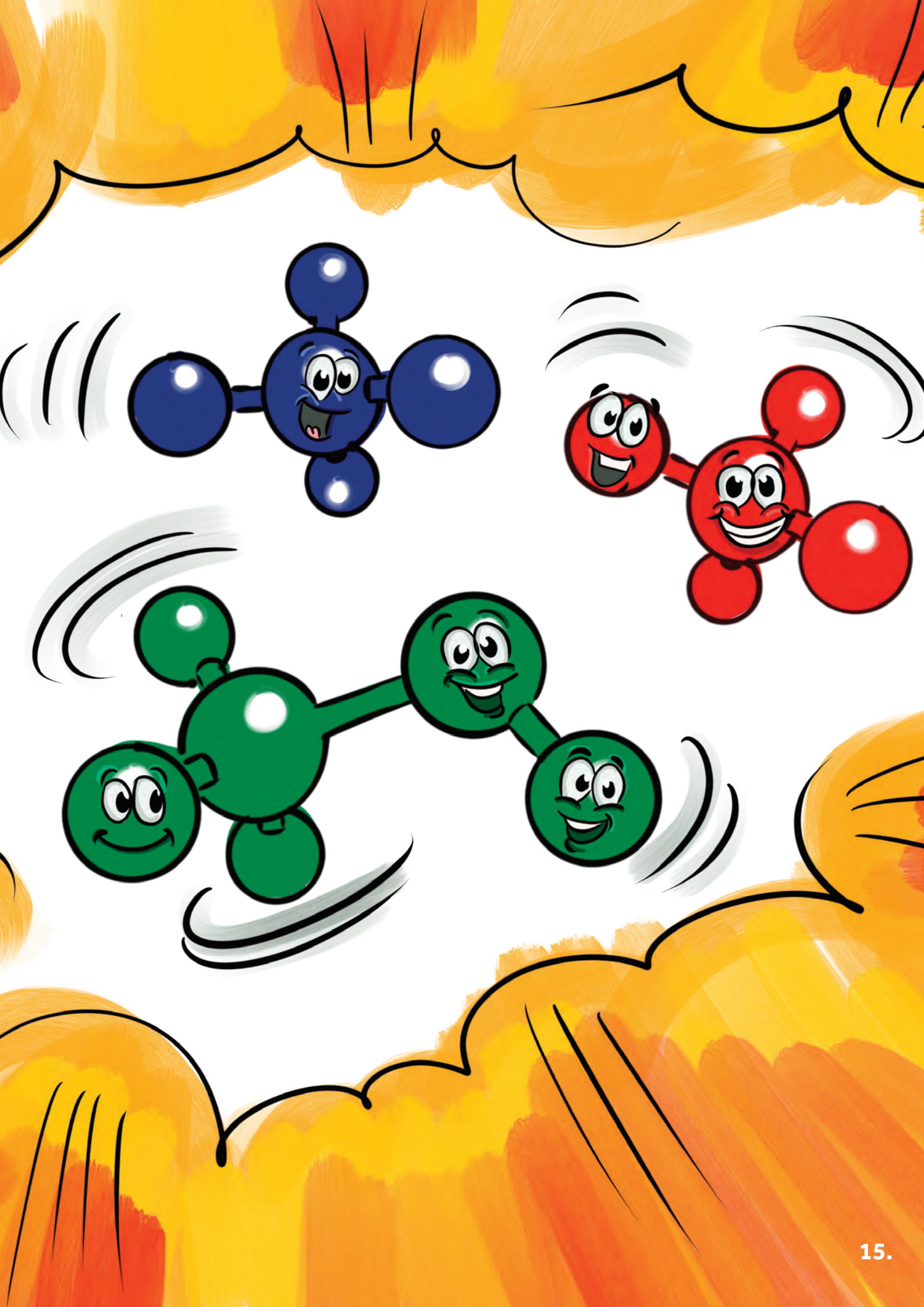
The ICE framework™
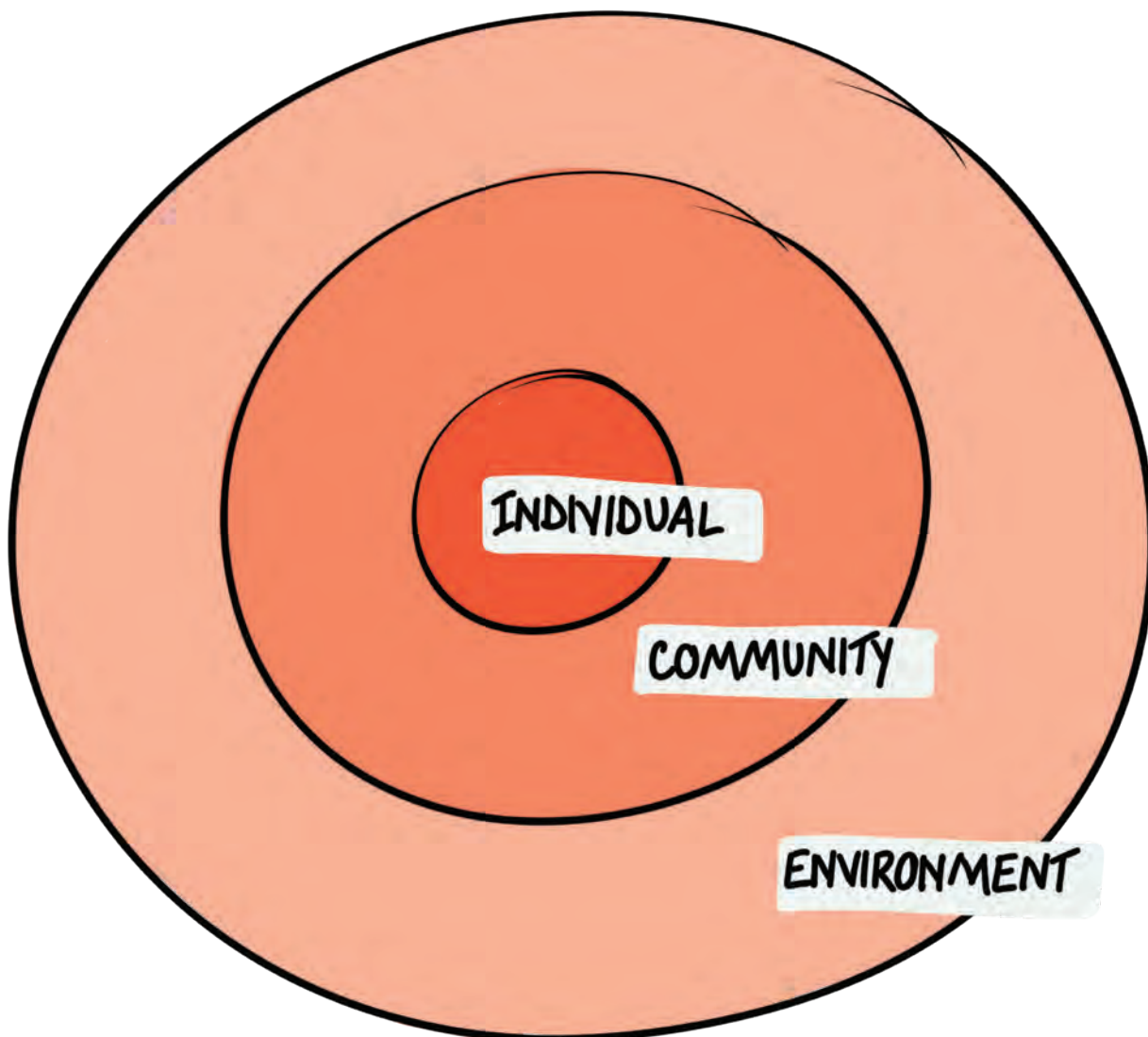
Figure 1: The ICE framework*

Source: Author's own design

The principle

Many leaders show an affinity for the instinctive, for taking the plunge when something 'feels right' or when their 'gut' points to a clear direction. However, many people become despondent when it comes to explaining the inner workings of this instinctive mental process. The ICE framework provides the missing link between intuitive knowing and strategic intent.

*Frameworks and models assume a rational and non-disruptive world, and so are simply a start point to guide one's thinking. The ICE framework represents water frozen as a snapshot for inspection and understanding, while of course not being fully representative of the flowing water of reality.

- The **individual groove** layer embraces personal resonance in the form of self-care, personal mastery, and a deep awareness of innate rhythms. It implies personal resonance, indicating how individuals oscillate in a manner that is the best fit for their personal rhythm. Without these basics, internal harmony cannot be achieved, and the ability to work in accord with others becomes compromised.

- The **community groove** level radiates from both the individual and the group to embrace the immediate space in which we operate, from our family and friends to teams, groups, and the organisations for which we work or through which we study and learn. Operating on the group level necessitates that we each work on developing the muscles necessary for effective engagements, such as open-mindedness and empathy, and the ability to understand another's feelings, thoughts, emotions, and perspective.

- The outermost layer, **environmental groove**, zooms us out to the point where each individual is more clearly seen as an essential part of a complex and well-coordinated system that is continually influenced by changing global cycles. This system is defined as the universal environment in which individuals and groups operate, encompassing towns, cities, countries, continents, and the world. In this outer ring, the bigger picture of trends, geopolitical developments, and mindset shifts become clearer, highlighting how these external vibrations impact our own reverberations, even as we are expected to operate in sync with others.

If we accept that performance is enhanced when 'there is a seamless fit between their [high-calibre performers'] internal self and their external environment' (Newburg et al., 2002: 249), then it makes sense to start the ICE journey by focusing on personal resonance. This encompasses not only issues of wellness, health, and mental well-being, but also the natural cycles and rhythms we all have hardwired into us and which affect our energy and creative levels throughout any given day.

To achieve system-wide resonance, the three layers that comprise the ICE framework must vibrate in harmony, much as a cymbal in a drum kit does when struck cleanly and neatly.

Individual groove: personal resonance

Jazz musician Charlie Parker (cited in McCrorie, 2021: 69) is credited with saying, 'You've got to learn your instrument. Then, you practice, practice, practice. And then, when you finally get up there on the bandstand, forget all that and just wail'. In 2002, this premise was expanded on by Rosamund Stone Zander and her husband, Benjamin Zander, the highly regarded English conductor, who highlighted the value of personal alignment and how this enables leaders to better contribute to – and orchestrate – the world around them by harnessing the power of innovation and invention. Zander (2008) described resonance with an audience as a 'shining eyes' moment, where all around you are looks of inspiration and passion. This definition can be used to guide every aspect of our lives: only when individuals have mastered their own instrument can they expect to harmonise effectively with others.

The individual groove core of the ICE framework is completely within the control of the individual. It hinges on self-awareness, mindset, and openness to the world around us, which all combine to make it easier for us to navigate a changing world. Developing internal resonance is something we can all work on and develop by taking care of the basic elements of rest, nutrition, and exercise, which help us be present and energised by virtue of positively supporting our brain function (Gómez-Pinilla, 2008). With these fundamentals in place, personal resonance ripples outwards to our engagements with family, friends, and colleagues, and at a broader level to our wider networks as well as the physical environment.

Consequently, the roots of resonance do not lie in grand teamwork exercises and external motivations – although these definitely have their place – but within ourselves. We are the foundation of systemic resonance.

# Community groove: group resonance

Once the core ingredients for personal resonance are in place, we can expand into the second circle. This concerns how we fit into our immediate surroundings, be it our family, friends, teams, groups, and the organisations for which we work or through which we learn. To align our personal resonance with communal resonance, the focus turns to developing the muscles necessary for effective engagements, such as deep listening, communication, empathy, open-mindedness, and understanding other people's points of view without the pressure of agreeing – much as you might see playing out when a traditional percussion ensemble is in the groove.

Ray Dalio (2017), the man behind the world's largest hedge fund, Bridgewater Associates, often uses the analogy of a jazz quartet to describe the power of achieving natural harmony and by being in sync with one another and the world around us. Dalio (2017: 368) explained:

In jazz, there's no script. You have to figure things out as you go along. Sometimes you need to sit back and let others drive things; other times, you blare it out yourself. To do the right thing at the right moment you need to really listen to the people you're playing with so that you can understand where they are going. All great creative collaborations should feel the same way.

The community level explores how to create and innovate at the interpersonal level, working in teams, groups, friendship circles, and families, as well as individually. The primary focus of this level is working effectively in teams by slotting what you do in harmony into an equally resonant team community. While we can control our own reactivity, we have no control over others. So, as our energy and attention shift outside of ourselves, personal control decreases. Nevertheless, some elements linked to our personal relationships still require our attention, including how we manage ourselves in a group context.
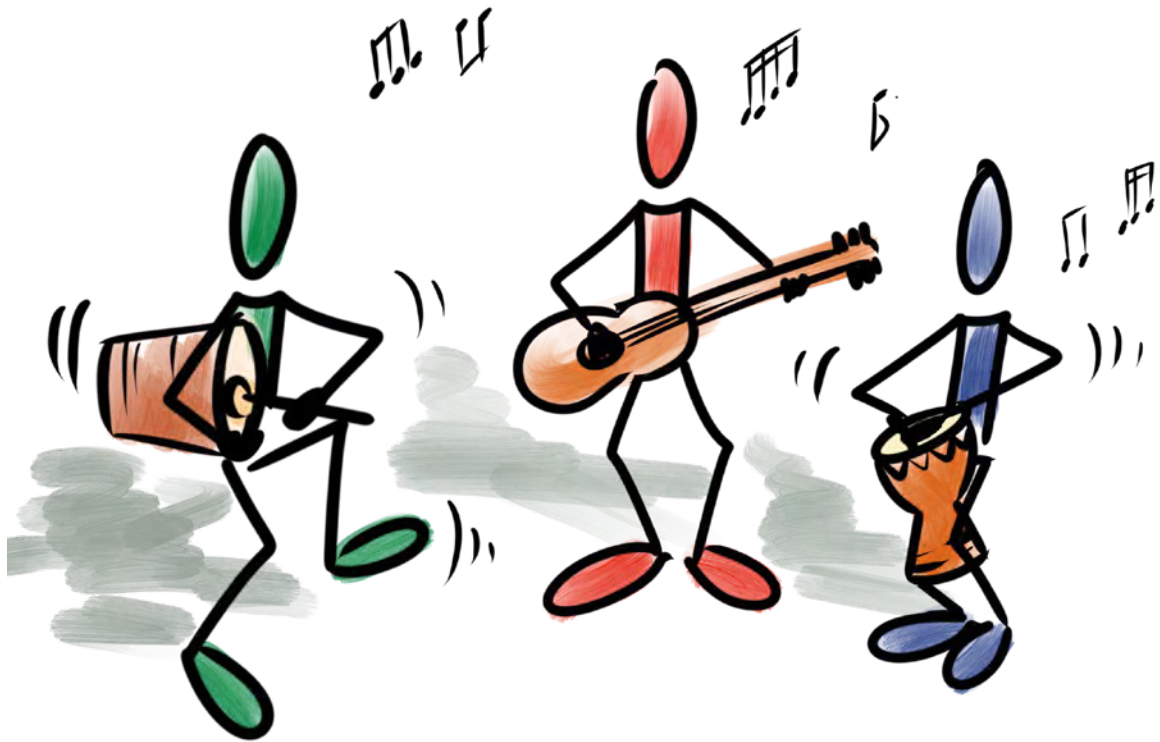
Environmental groove: systemic resonance

The outer circle of the model – environmental resonance – is completely out of our control. It concerns our connection to the world and what the late David Bohm (1980), the acclaimed theoretical physicist, called the implicate order. Bohm (1990, cited in Roemmele, 2018) explained his view as follows:

> We are internally related to everything, not externally related. Consciousness is an internal relationship to the whole. We take in the whole and we act towards the whole. Whatever we have taken in determines, basically, what we are.

The influence of Chinese philosophical writings known as Taoism feature extensively in the appreciation of yinyang, flow, simplicity, and harmony (Wang and Wang, 2020). This was elegantly captured by Watts (1975: xiv), who described Taoism as 'man's cooperation with

the course or trend of the natural world'. Bohm (1980: 1) held that the fragmentation inherent in how we live our modern lives was leading to 'a kind of general confusion of the mind, which creates an endless series of problems and interferes with our clarity of perception so seriously as to prevent us from being able to solve most of them'.

Drawing these fragments together is crucial at an individual, community, and environmental level, and for developing the ability to see and solve problems by appreciating the cycles around us and how we are all connected. This calls us to be fully aware of global cycles, trends, geopolitical developments, and mindset shifts. Whether we like it or not, whether we feel able to exercise some influence on our universe or not, we are connected to the rest of the world and must be aware of and in tune with those reverberations. If we apply awareness, alertness, learning, and curiosity, reality can be a best friend, provided that we develop our individual core to filter out the unimportant noise and develop the ability to focus on the important influences. Tactics for achieving this include using the PESTEL analysis framework, first-principles thinking, and Dalio's problem-solving model.

The final environmental ring asks us to adopt a drone's eye view of the world from a distance to more completely understand our environment. We need to assess how our resonance fits in with global rhythms to determine if we are a systemic fit. If not, we may be compelled to reflect on our views and beliefs and determine if the organisation we work in or the country or community we call home are in tune with our personal 'jiggles and wiggles'.
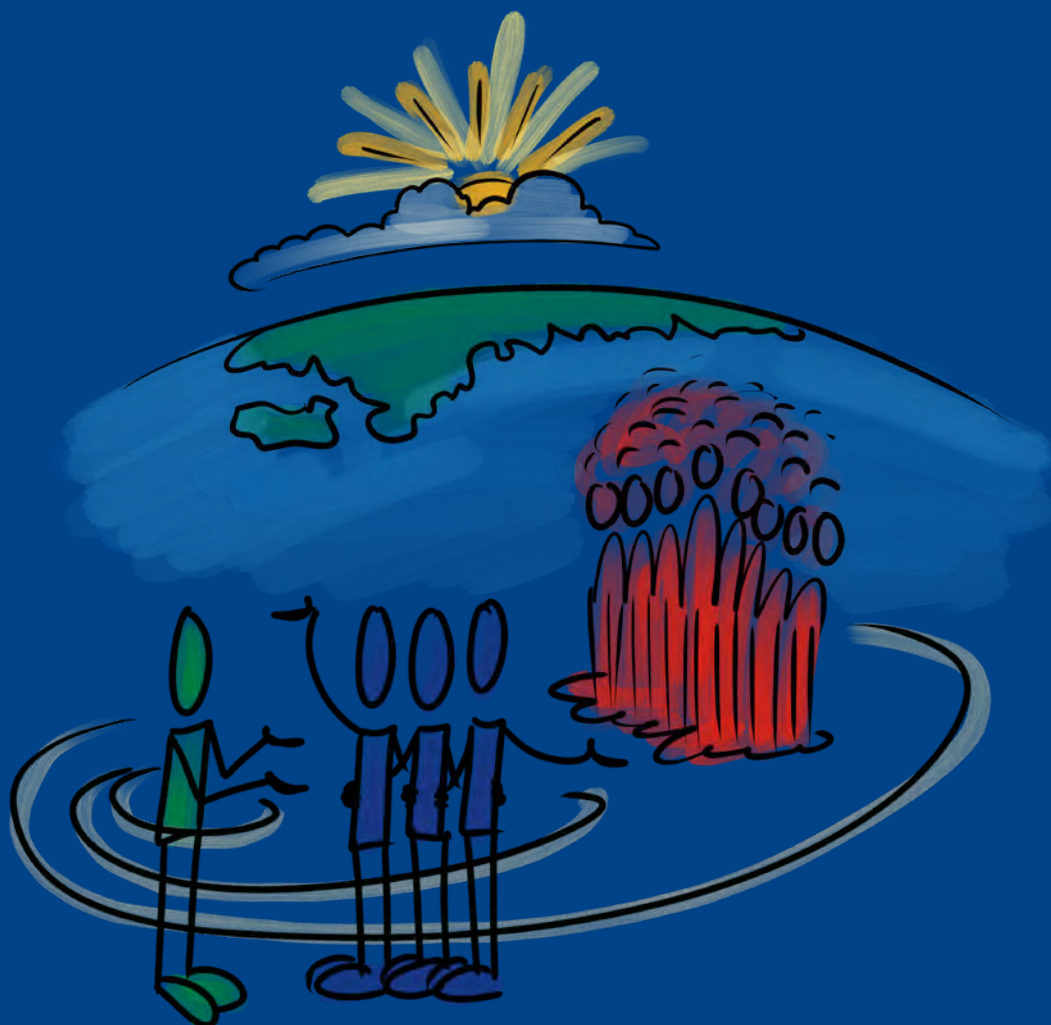
Working together: the '2 against 3' rhythm of nature

Achieving resonance, as depicted in Figure 1, requires a holistic approach and an understanding of perspective. Perspective or point of view is described in physics – much as it is when using the musical analogy of rhythm – by the three ICE positions (i.e., individual, community, and environmental), which vibrate through to all other areas of our work and social lives.

The so-called '1, 2, and 3' relationship is represented in physics, nature, musical rhythm, and human behaviour – where the 1 (or +) represents one point of view or position; the 2 (or -) indicates another point of view or position; and the 3 (or +/-) represents the big picture perspective or superposition. Current computer algorithms deal only with two positions (- or +), although the future of quantum computing is built on all three positions, which reflects a systemic approach (Matsuura et al., 2019).

In most natural music forms, a '2 against 3' polyrhythm (two or more cycles occurring in the same space, with the same start and end points, and in harmony) exists and represents this harmonic pattern of 1, 2, and 3. Like any learning, it takes time and effort for a musician to 'hear' these patterns, which initially are perceived as chaos. This coded rhythmic grouping is embedded in African music, underpinning all contemporary music that we now recognise as soul, hip-hop, rock, jazz, or blues, and where natural harmonic rhythms have their best and most innate expression. In essence, this '2 against 3' pattern could be described as the rhythm of nature, showing us that it is possible for small or large groups to be perfectly aligned and to operate in harmony. Similarly, resonance of this type can be applied to the shared purpose within complex systems to achieve flow.

One could say that normal perception has blind spots because it generally focuses on the individual's level of reality. However, increased consciousness enables humans to see, not only their point of view, but also the views of others (group view) by applying empathy and deep listening. Big picture mental models take this further and enable a universal point of view and superposition understanding. This systems thinking approach, as coined by systems scientist Barry Richmond in the 1980s, spans the words of art and science uses this multi-thinking effort to make 'reliable inferences about behaviour by developing an increasingly deep understanding of underlying structure' (Arnold and Wade, 2015: 671). Over the years, researchers like Peter Senge, Linda Sweeney, John Sterman, and Jay Forrester have built on this notion of systems thinking to expand accepted thinking to encompass 'interconnections, the understanding of dynamic behaviour' and 'the idea of seeing systems as wholes rather than parts' (Arnold and Wade, 2015: 674).

When describing the end result of achieving rhythm and synchronicity in life, Toro (2019: 11) stated:

> When it is a groove, the whole world appears to be rosy, meaning that the feeling is a good or positive one so we want to be in a groove as much as possible…. This is what it is to experience rhythm. It is the flow of many events in time, but you aren't aware of time, and it all just happens and you just ride this wave.

Toro (2019: 11) added that, 'The interesting thing is that rhythm is not always possible as it can get interrupted, but if you practice this good feeling you will try to get into rhythm no matter what the situation is because it is better to be in rhythm than out of it.'
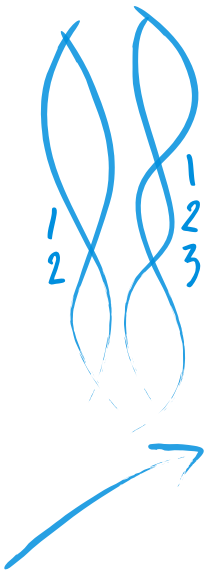
Creativity, flow, and connection

Flow, being in the groove and natural rhythm, is the required state for innovation and creative problem-solving. Using the ICE framework, it is possible for individuals to better understand the role of resonance in their own lives. There are also learnings at the corporate level, specifically around the need for teams and organisations to be mindful of the natural, encoded cycles of individual employees. Only by doing so can business expect to unlock maximum impact from their so-called human capital (Pink, 2018).

Tony Schwartz and Catherine McCarthy referenced the then MD of Sony South Africa, Matthew Lang, in their 2007 *Harvard Business Review* article on how to effectively manage energy rather than putting in longer hours at work. Lang (now the international MD of technology group Vestel in the UK) shared his routine of taking a 20-minute walk in the afternoons to give his mind a break from active thinking. During this minibreak, Lang found that he came up with his most creative ideas, had better clarity about the environment around him, and was able to let his imagination fire (Schwartz and McCarthy,

2007). This is a perfect illustration of how the Taoist philosophy and form of meditative practice (Watts, 1975) can be an effective hack for the new world of work. Paradigm-shifting innovations come out of the very periods of flow that Lang (Schwartz and McCarthy, 2007) was able to achieve by tapping into his personal rhythms, and which enabled him to resonate with the environment around him and enter 'slowed down' present time.

The game of anchoring one's self in present time is a simple and effective way to find flow when needed. For example, think of a time when you were acutely and memorably 'in flow' – maybe time stood still while you were enjoying an effortless sunset run, or you were delivering an impactful keynote presentation to a captive audience. Perhaps it was while you were playing with your kids in the back garden. Once you can pinpoint an anchor, it is possible to create a reminder of that moment of energised focus by deploying a ritual, such as touching your left ear lobe or rubbing the palm of your hand, to visualise yourself back into that state.

By understanding the mechanisms that anchor you back in a state of creativity, flow, and connection, it is possible to match your ICE framework with those of others in your life or work teams, and build the internal and external resonance necessary to create the best conditions for sustained success.

The final groove

Until recently, the notion of resonance in business largely centred on employee development and getting the most out of teams – focusing on the 'I' and the 'C' layers of the ICE framework. At a strategic level, resonance remained the realm of marketing and branding efforts in an attempt to connect with employees, clients, and stakeholders by ensuring consistency of marketing efforts and public relations output (Stones, 2019). To truly resonate with individuals and create the harmony required for effective teams – or percussion ensembles – to perform at a high level, companies and individuals need to focus across all the layers of synchronicity.

Using universal metaphors from music tells us that imperfect chaos will indeed sound imperfect, unless you raise your awareness, understand your own role within the larger system of which you are a part, and become connected to the whole.

The points indicated in this white paper, and their impact on individuals and organisations when trying to realign themselves in a changing world, call for the shifting of corporate strategies in line with a widespread move towards ethical business and leadership practices, sustainable thinking, and a more inclusive and diverse world.

In essence, applying the ICE framework supports:

- **Evolving workplace structures and increased flexibility that are chronobiologically tuned;**
- **Developing personally resonant employees;**
- **Building connected teams capable of working well together;**
- **Fostering conditions for creativity and innovation to flourish; and**
- **Embedding business practices and strategy that are in harmony with current world trends and thinking.**

Strategic intent that resonates across these multiple levels not only supports human development through times of change and transition, but also ensures the success of future-fit organisations to be confidently capable of operating in the groove.

By implementing *the ICE framework* as a way to conduct yourself and interact with others, individuals and organisations can develop a systems-based approach to resonance that encourages personal mastery and development with the same consistency as it seeks to improve team dynamics. The upshot *is better communication, a sense of well-being, increased open-mindedness, improved creativity, openness, responsiveness, innovation and flow, as well as enhanced intrinsic motivation levels* (Ruthven, 2020).

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From rigidity to
reso-
nance

Deliberate
collaboration

Julian Day, PhD

July 2022

Henley
Business School

AFRICA

Many people have experienced the collaboration methodologies that I use or teach, but have never seen the underlying theory in use that informs these methodologies and drives me in practice. I believe that reflective practitioners can develop robust theories worth sharing and I hope mine makes a valuable contribution to anyone struggling with complex projects and organisational effectiveness. Thank you to Prof. Alet Erasmus for reviewing the white paper.

Abstract

This paper develops a practical theory of human collaboration from a practitioner's perspective that could be of value to anyone struggling to manage complex projects. The paper takes a systems approach in viewing projects and organisations as a conversation system, and integrates principles from distributed cognition and small world networks. The theory arose from a concern about persistent failure of organisational projects, particularly information technology projects, and a worry that mainstream project management has inadequate theory to inform viable methodology in complex situations.

The paper argues that the success of projects depends on the design of the conversations in which project commitments are made. It argues that contagious manageability can be achieved by redesigning the cognitive environment of the conversation system to create a small world where it is possible and easier to achieve a workably accurate understanding of 'what is going on' in everyone's mind.

Contents

Disclaimer

Aligned with our mission, 'We build the people who build the businesses that build Africa', we facilitate open, multi-perspective conversations and the generation of thought leadership pieces, such as this white paper. However, the views expressed in this white paper are solely those of the author and not necessarily those of Henley Business School Africa.
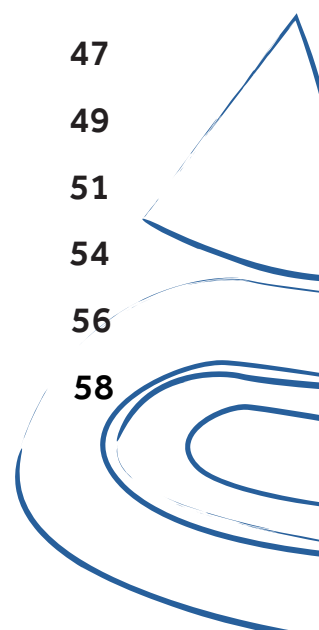
Introduction

Whenever we find ourselves struggling with persistent problems, it is usually the theories that we rely on that let us down. As Kurt Lewin said, 'there is nothing so practical as a good theory' (Lewin, 1952: 169). A good theory enables us to understand, predict, and master situations we need to manage, and when our lives are manageable, we can cope and have a chance at happiness. If the theories we depend on are flawed or missing altogether, we struggle to cope and life can seem unmanageable. In this paper, from the perspective of a reflective practitioner, I will develop and describe the theory-building process of a practical theory of collaboration, and explain its value to create manageability in complex situations I have had to manage.

A struggling industry

I am interested in manageability because I worked in a struggling industry for 20 years. During the 1980s and 1990s, I worked in information technology (IT) – initially as a computer programmer and later as a systems analyst and project manager – developing and implementing software systems for large organisations. When I started in the industry around 1980, 15% of software projects around the world were complete failures (DeMarco, 1982). The industry responded by investing in project management and software development methodologies. These methodologies grew voluminously in an effort to improve the reliability of software implementation. Instead of improving, the situation deteriorated, and by the mid 1990s, worldwide failure in software projects had grown to around 75% (Standish Group, 1994). I became demoralised and started to question the methodologies, wondering if they were causing more harm than good. Twenty years later, nothing much had changed, with only 29% of IT projects considered successful (Standish Group, 2015).

What methodologies told us

The methodologies told us how to manage our projects, but I started to worry about manageability as the methodologies seemed to assume that our projects were manageable from the beginning. They provided tools and techniques for gathering requirements, assuming the existence of predefined business rules. For example, if the business rule is to apply a 5% settlement discount on invoices paid within 15 days, then there is no problem programming this into an IT system. However, the business struggled to determine new rules while the IT system was being designed, causing confusion. I often found myself embroiled in dysfunctional conversations fraught with dilemmas, disagreements, and prevarication while the business agreed elusive business rules. These conversations fell into a grey area, where business and IT were both ill-equipped, and the usual default was to see it as a 'systems issue' to be delegated to IT. The collaboration between business and IT often seemed dysfunctional and unmanageable.

Project Management Body of Knowledge

Many of my colleagues in the 1980s and 1990s would be familiar with the Project Management Institute's (PMI, 2000) Project Management Body of Knowledge (PMBOK). This is the gold standard methodology that epitomises mainstream project management and is the text that people must study to become accredited PMI project management professionals. The PMBOK is not exclusive to IT projects and is a mainstream methodology widely used by project management professionals in many industries. It is significant that the 2000 edition of the *PMPOK Guide* does not mention the word 'collaboration' in the index, nor covers collaboration as a topic essential for successful project management. There is a short chapter on communication, but nothing on facilitating conversations necessary to agree on decisions. Decision-making is covered in a single paragraph. Collaborative decision-making is fundamental to project success and I wondered why the methodologies did not provide any help with this.

Shortcomings of the Project Management Body of Knowledge

Surprisingly, 'theory' does not appear in the index of the 2000 edition of the *PMBOK Guide,* nor is there a chapter covering project management theory. A profession should be founded on solid theory, which I searched for in vain. Eventually, I found a paper delivered at a PMI research conference that began: 'In prior literature, it has been generally seen that there is no explicit theory of project management' (Koskela and Howell, 2002: 293). The paper further describes efforts to extract the theoretical foundations *implicit* in project management as espoused in the PMBOK, and concluded: 'This foundation is obsolete and has to be substituted by a wider and more powerful theoretical foundation' (Koskela and Howell, 2002: 293).

The paradigm shift

By the time I read the above-mentioned paper (Koskela and Howell, 2002), I had already experienced my own paradigm shift while conducting my PhD research, titled *The design of collaborative projects: language, metaphor, conversation and the systems approach* (Day, 1999). I felt vindicated having already responded to their call for action by developing 'a wider and more powerful theoretical foundation' of my own.

So far, I have been describing my struggle in the IT industry during the 1980s and 1990s, unpacking some questions that motivated my research into the design of collaborative projects (Day, 1999). I was looking for a practical theory that would enable me to create manageability in the complex projects I had to manage.

Action learning

I am continually surprised that so many people struggle to distinguish *theory* from *method*. For instance, I have taught collaborative project management to master's students who know the PMBOK inside out, yet never realised that it is a methodology, not a theory. Figure 1 clarifies the distinction.
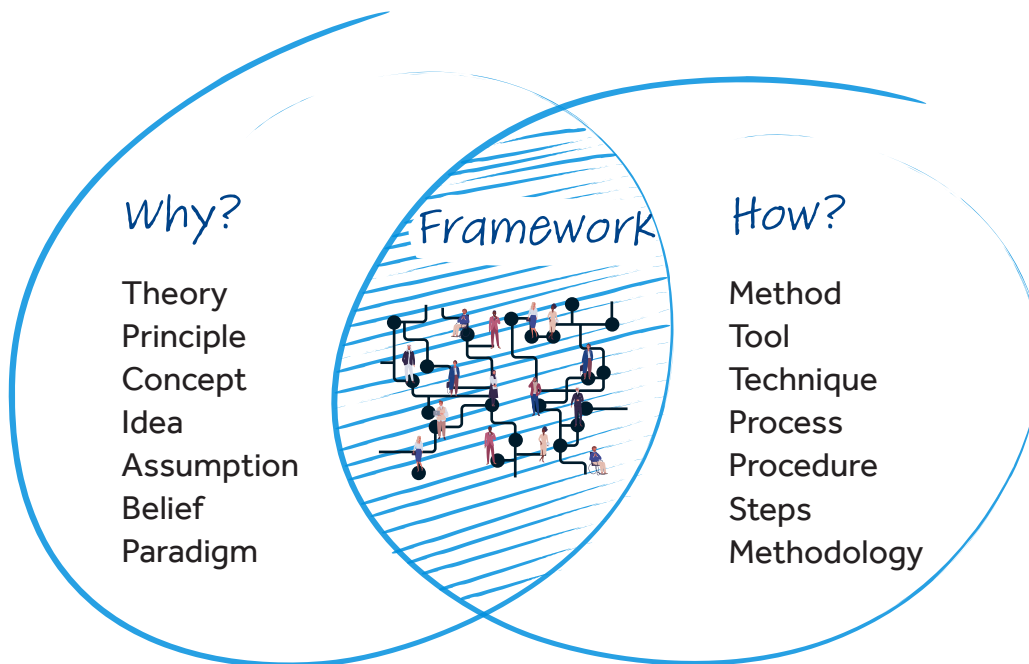
Figure 1: Theory versus method
Source: Own design

I developed my PhD using Checkland's FMA model for action research, depicted in Figure 2. Checkland believes that we learn by testing Methodology derived from a declared-in-advance Framework of ideas, and applied to an appropriate Area of application (Checkland and Holwell, 1998).

I believe that action learning is 'strong' when we test, question, and revise the theories that inform methods. We need to understand 'why' (the theory) in order to have confidence in 'how' (the method).

Checkland's FMA model

Methodology

M

F

Framework of ideas

Learning about
F, M, A

Area of
Application

A

Handy's learning wheel

Question

Reflect
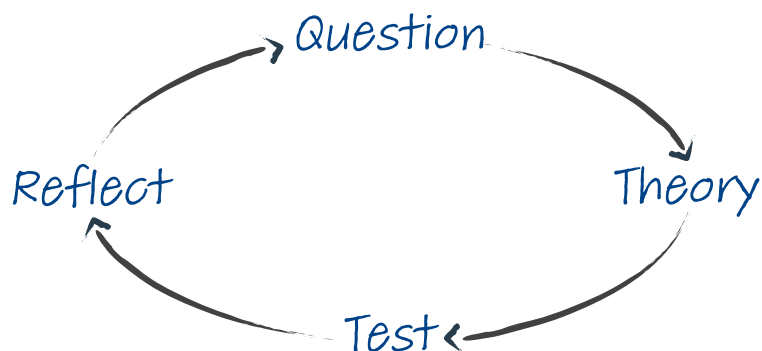
Theory

Test

Figure 2: Action research
Source: Checkland and Holwell (1998); Handy (1991)

Action learning is iterative, as represented by Handy's learning wheel (refer to Figure 2). Moreover, Handy believes in testing *declared-in-advance* theory and consciously reflecting on experiences in order to learn. The model shows that questions can evolve and learning is about rethinking questions as understanding evolves (Handy, 1991), which was my experience. I had no idea the extent to which my original question would evolve and open up so many unexpected paths of inquiry.

When I began my action research, I asked: 'How can we prevent project failure in the IT industry?' This revealed the importance of collaborative conversation, leading to experiments with conversation design, which led to experiments with collaboration design, and ultimately to answering an entirely different question from the one I started with: 'How can I design productive collaborative projects in complex situations?' This question is relevant to all industries, so I am now able to operate beyond the narrow boundary of IT

Reflective management practice

On graduation day, my PhD supervisor said, 'Now your learning can begin.' How right he was. For the next 20 years, my challenge was to make my theory of collaborative projects practical for everyday use. I was no longer doing formal action research, but I still needed to keep on learning to figure out exactly how to add value to people struggling with collaborative projects. Who do I talk to? How do I talk? How exactly will I operate? What are my services and products? Where can I add value? These questions necessitated ongoing learning to boost self-belief and confidence, while understanding that I must add significant value to clients every time I work.

Believing that you are only as good as your last job exerts powerful pressure to keep on learning.
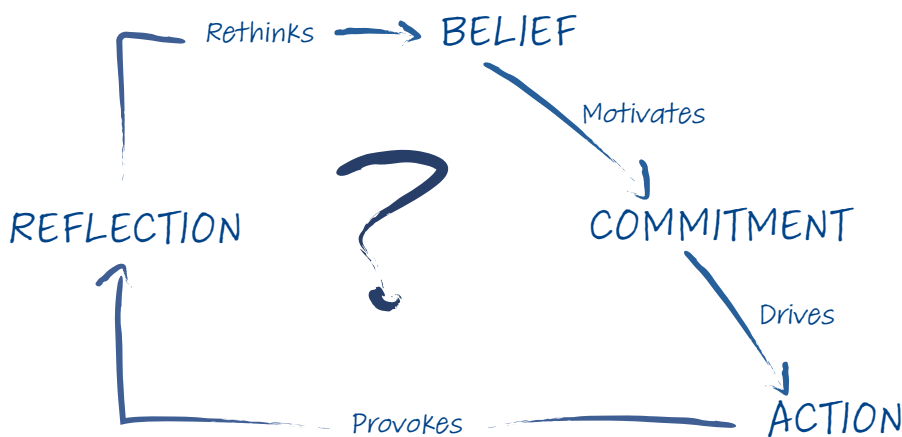
Figure 3: Manager's action learning model
Source: Day 2019

I believe management is an action learning process. Figure 3 shows a generic action learning model I developed for anybody who needs to manage anything. The quicker we learn, the quicker we win, so we need a model to drive reflective management practice. Action learning revolves around a question that can evolve as we learn from positive and negative experiences. The model emphasises execution, that managers need to 'get things done'.

Without belief, there is no motivation to commit; and without commitment, there is nothing to drive action.

The action learning model asks managers to rethink *belief* as opposed to *theory*. Although these words have similar meanings and are almost interchangeable, I think that belief is less intimidating for practitioners. The more people we have in a situation, the more complex it becomes because multiple perspectives may diverge significantly, yet all be legitimate. It is difficult to make joint decisions under these circumstances and projects fail when there is a lack of agreement or no shared belief. Implementation requires sufficient shared *belief* to motivate *commitments* necessary to drive *action*.

Practical theory

The theory for collaborative projects that I developed in my PhD represents my *espoused theory,* fresh in my mind in 2000, but not the *theory in use* that guides me now in practice. My espoused theory of collaborative projects is a comprehensive systems model, covering many variables and numerous interactions between them. It was important for me to understand the system dynamics of collaborative projects, but as a practitioner, I now find the model cumbersome, although it is still there in the background and has done its job. My current theory in use has evolved in the last 20 years and I will represent it according to Einstein's dictum of 'Everything should be made as simple as possible, but no simpler'.

Figure 4 represents a theory of collaboration in 'deep simplicity' (Gribbin, 2004). It shows the principles that have stood the test of time and served me well, which have reinforced each other systemically and are embedded in my mind as a cohesive whole, without causing cognitive overload. This is the theory that I strongly believe in right now. From a pragmatic perspective, I am much more concerned with whether it works for me in practice, than whether it is academically correct. My practical learning might lag behind current research. So, as a reflective practitioner, I offer this theory in deep simplicity as my contribution to knowledge.

I have a taken a systems approach to collaboration.

For the purpose of this paper, it is sufficient to conceptualise a system as a collection of parts that interact to function as a whole (Kauffman, 1980: 1). Inherent in the systems approach is the adage that the whole is greater than the sum of its parts, that the system has *emergent properties* that cannot be understood simply by analysing the parts of the system in isolation from the interaction between the parts. Human organisation emerges when people interact. We will never understand human organisation (the whole) merely by analysing people (the parts of the system).

Figure 4 shows people, who make up the parts of the system, interacting to form a whole, which might be a family, a project, a team, an organisation, or a community. Collaboration involves people who think, talk, and act to make shared commitments to shared goals. To create manageability, we need to understand and integrate practical principles around thinking, talking, and acting. The theory triangulates principles of distributed cognition, conversation systems, and small world networks. For these three elements, I have attached statements from Edwin Hutchins (2000: xvi), Kenneth Boulding (1956: 45), and Stephen Strogatz (2003: 251) to provide an entry point to dig for deeper insights. Similarly, statements from Michael Tomasello (2006: 14) and Ludwig Wittgenstein (cited in Raban, 1999: 151) provide an entry point for contextualising human collaboration. My statements subsequently summarise my theory of manageability.
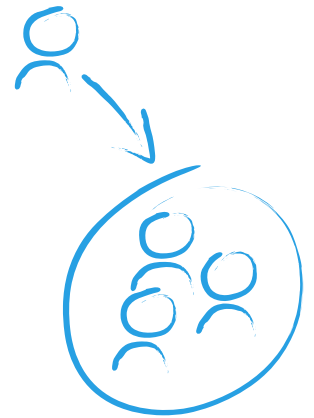
Collaboration:

'Only humans have the skills and motivations to engage with others collaboratively, to form with others joint attention in acts of shared intentionally.'
(Michael Tomassello, 2006: 14)

'The world we live in in the words we use.'
(Ludwig Wittgenstein cited in Raban, 1999: 151)

Thinking
Distributed cognition

'The environments of human thinking are artificial through and through. Humans create their power by creating the environments within which they exercise those powers.'

(Edwin Hutchins, 2000: xvi)

'Propagate a representational state in the face of a series of disruptive event.'

(Edwin Hutchins, 2000: xvi)
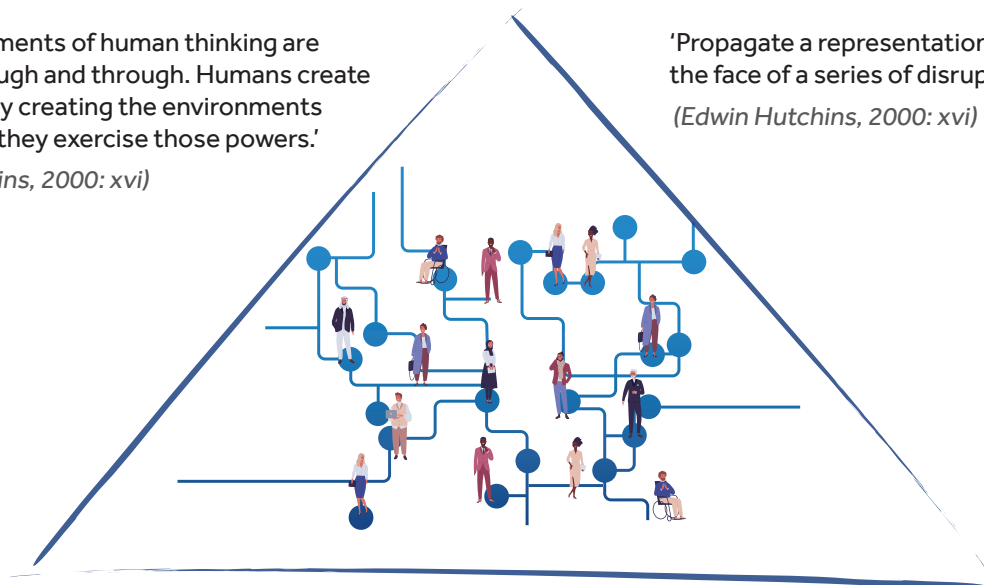
A system is a collection of parts that interact to function as a whole

Talking
Conversation systems

'The study of a man is the study of talk. Society is an edifice spun out of the tenuous webs of conversation'.

(Kenneth Boulding, 1956: 45)

Acting
Small world network

Anything that can spread- infectious diseases, computer viruses, ideas, rumours- will spread more easily and quickly in a small world.'

(Steven Strogatz, 2003: 251)

Manageability:

'Striving for 2nd order intentionality to create and re-create a workably accurate understanding of each others minds.'
(Julian Day, 2022)

'The world we live in is the representations we use.'
(Julian Day, 2022)

Figure 4: Theory of collaboration
Source: Own design

Human collaboration

Tomasello (2006: 14) framed collaboration as 'acts of shared intentionality' (Figure 4). Intentionality is a philosophical term referring to an entire mental state and how it is directed towards an object, situation or state of affairs. In simple terms, intentionality refers to the contents of our minds (Dunbar, 2004: 45).

Even though we are so closely related to chimpanzees genetically, there is a fundamental difference between the minds of chimpanzees and that of humans (Tomasello, 2006). Humans are mind-readers, giving us the ability to think about what other people are thinking. A chimpanzee knows what is going on in its own mind, but it does not have 'theory of mind' (Dunbar, 2004: 43) – that is, chimpanzees do not know that other chimpanzees have minds, so they do not know what they are thinking. Humans are excellent mind-readers and, at around the age of four, the human child becomes increasingly adept at understanding what is going on in other people's minds (Dunbar, 2004: 43).

If I say, 'Joe is angling for promotion', I am operating in second-order intentionality because I am thinking about what is going on in Joe's mind. If I say, 'Sue thinks that Joe is angling for promotion', I am operating in third-order intentionality because I am thinking about what Sue is thinking about what Joe is thinking. Human mind-reading is very sophisticated and we can operate in fourth- and fifth-order intentionality, even sixth-order is possible but mesmerising (Dunbar, 2004: 46). In general, the less mind-reading we need to do, the more manageable our lives. Chimpanzees come quite close to attaining second-order intentionality, not quite reaching the level of a four-year-old human. No other animal attains second-order intentionality, not even clever animals like dolphins (Dunbar, 2004).

Naturally, mind-reading can be inaccurate. Perhaps I am mistaken, perhaps Joe is not angling for promotion. We can see how confusion and misunderstanding can

propagate. The remedy is meaningful conversation. Mary might say, 'Julian, you are mistaken. I have just spoken to Joe, and he is quite happy in his current position.' Now, there are four people interacting in a conversation system (i.e., Joe, Sue, Mary, and Julian), all trying to figure out what other people are thinking. Somebody needs to talk to Sue because somewhere in the system there is misunderstanding and potential dysfunctionality. This example illustrates the connection between conversation and mind management.

Projects become complex when mind- reading at high orders of intentionality is necessary to figure out 'what is going on', and can become unmanageable when inaccurate mind-reading propagates confusion.

Boulding (1956: 45) stated that 'the study of man is the study of talk' (Figure 4), which is significant as he refers to 'talk' rather than communication. All animals can communicate, but only humans can engage in meaningful conversation. I can communicate with my dog to coordinate her behaviour. My dog knows that she cannot get on my bed, but she does not know *why* because we cannot have a meaningful conversation about this. It sometimes seems as if my dog can read my mind, but she cannot as she has no theory of mind and is merely adept at observing and responding to my behaviour.

Tomasello (2006: 14) was interested in why chimpanzees have not developed language and argued that it is because they cannot form 'joint attention'. At about 12 months old, human babies respond naturally to the pointing gesture. If you point to something, such as a light, a 12-month-old will automatically look at the light. If you do this

often and say the word 'light' at the same time, one day the baby will likely point to the light and say his/her first word, 'light'. Parent and child manage each other's attention naturally via the pointing gesture, which is essential for early development of language. To the contrary, chimpanzees (in their natural habitat) do not point for each other, nor do they manage each other's attention, which is unsurprising considering they have no theory of mind. For Tomasello (2006), the interesting question is not so much why chimpanzees do not talk, but why do they not point for each other?

Having delved into Tomasello's (2006) statement outlined in Figure 4, I can derive some principles for human collaboration:

1. Collaboration is uniquely human and should not be confused with coordination. Operating in first-order intentionality and interacting via communication merely coordinates behaviour.

2. Operating in second-order intentionality and interacting via meaningful conversation enables shared understanding.

3. In a nutshell, collaboration is shared commitment to shared goals.

4. Mind-reading impacts complexity and manageability. Shared commitment to shared goals is sabotaged when mind-reading is necessary, difficult, and inaccurate.

5. Meaningful conversation alleviates misunderstanding and reorganises people's minds, thus paving the way to manageability.

6. We facilitate learning by managing attention. Humans achieve joint attention instinctively and are born collaborators.

I am using 'collaborative projects' in a very broad sense to refer to any situation where large or small groups of people need to make *shared commitments to shared goals.* This could refer to a family holiday, a small team trying to meet their targets, or an IT project improving productivity of a business unit, developing, and implementing an organisational strategy.

Manageability

As per Wittgenstein (cited in Raban, 1999: 151), the human experience is mediated by language, that 'the world we live in is the words we use' (Figure 4). He believed that there are specific vocabularies associated with various 'forms of life', which he calls 'language games', that must be meaningful to participate in a form of life (Wittgenstein, 1958). A sentence like 'a waltz has a three/four-time signature' will be meaningful to people who understand music, but will be meaningless to everyone else. Productive collaboration, and team performance, may require investment in a language game. A couple who wants to learn how to waltz will need to invest in the language game of music.

How can we collaborate if we do not understand each other's language? If a stranger talks to me in Mandarin, I will not understand a word they are saying, and the situation may become unmanageable. Yet, because we are human and have theory of mind, we are still able to manage each other's attention. Mind-reading is instinctive – the stranger may draw a train on a piece of paper, point to it, and shrug his shoulders, and I will then realise he needs directions to the train station. I can point out directions with my finger or improvise a map that points the way. In this way, we make the situation manageable via representation and gesture, especially pointing.

This example helps me to articulate a theory of manageability (Figure 4): striving for second-order intentionality to create and recreate a workably accurate understanding of each other's minds.

If I am thinking about what a stranger is thinking, then I am operating in second-order intentionality. If my mind-reading is accurate, then our minds are aligned. I do not know everything that is going on in the stranger's mind, but I know enough to make the current situation manageable – in other words, my mind-reading is workably accurate. Most importantly, the stranger's mind-reading is also workably accurate, so we have an intersection of minds that is tight enough to 'get things done'. A situation is manageable when everyone knows that everyone knows 'what is going on'.

Meaningful words, and language games, facilitate collaboration, but so do representations. In Figure 4, I extended Wittgenstein's philosophy to:

The world we live in is the representations we use.

Distributed cognition

When Hutchins (2000: xvi spoke about 'the environments' in which humans 'exercise their powers' (see Figure 4), he argued that human cognition is socially and culturally distributed, located not only within the skin of an individual, but also in a surrounding environment, rich in organising resources. Unlike other animals, humans can offload cognitive tasks onto the environment and then interact with this environment to organise their minds and increase their powers (Hutchins, 2000). For example, my mind was disorganised as I began writing this paper. I offloaded the mess in my mind onto the environment in the form of a cognitive map, letting one thought lead to another, enabling me to see my train of thought. Figure 5 shows how I clustered themes together using colour, thus organising my mind and helping me to structure this paper. I referred to this map constantly, giving me the power to write this paper.
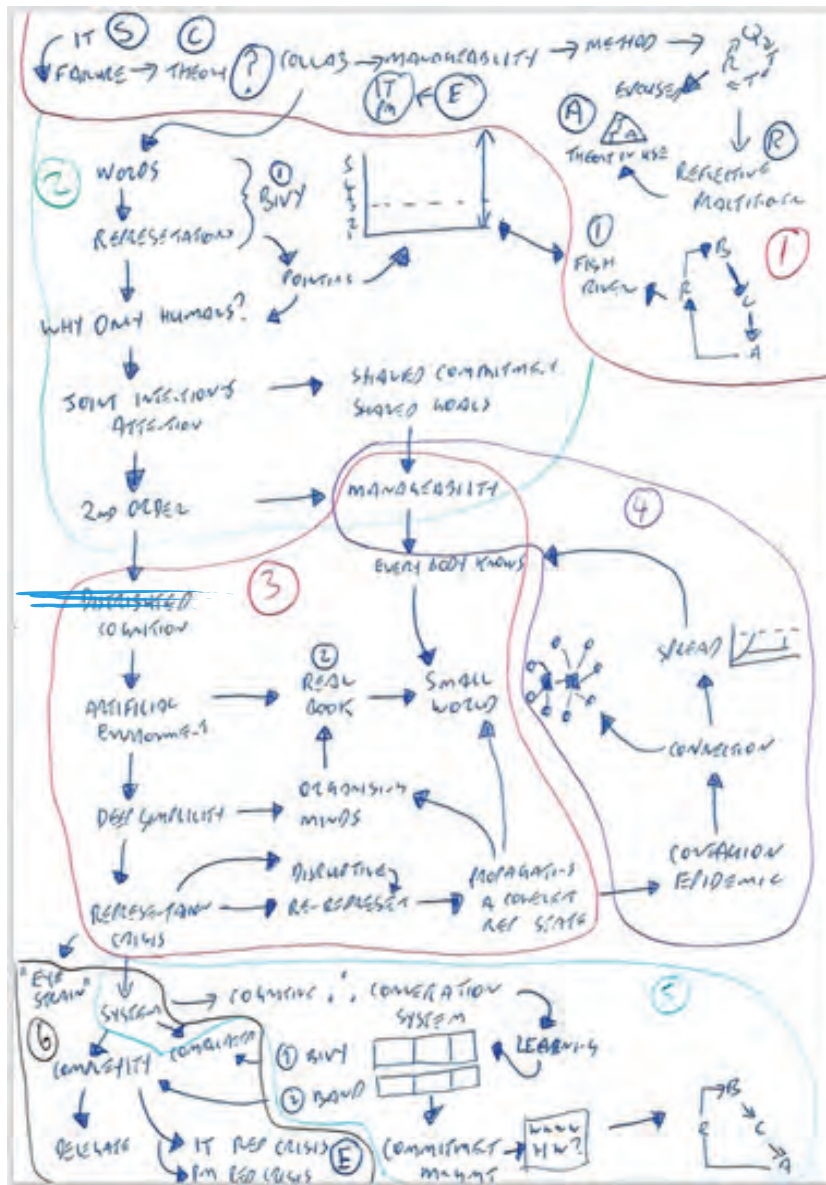
Figure 5: Cognitive map

Hutchins (2000) argued that human cognition is intrinsically social. When I offload my cognitive tasks onto the environment, not only does it help me organise *my* mind, but it may do the same for you. For instance, when I go on a hiking trip, I ease the cognitive load of remembering everything I need to pack in my backpack by referring to my backpacking list. People joining me on a hike have found my backpacking list useful to organise their own thoughts about hiking. If a system is a collection of parts that interact to function as a whole, we now have a distributed cognition system, where thoughts in people's minds (hikers) are structured by an environment that organises their thinking (the backpacking list). Cognition is socially distributed among people interacting within a shared cognitive environment.

If collaboration is shared commitment to shared goals, then our hiking trip is a collaborative project and the hiking group is a conversation system. The backpacking list not only organises cognition among the hiking group, but it also structures the conversations in which they make commitments to each other.

The success of the project will depend on the quality of the conversation. We make commitments when we talk. The way we think about something structures the way we talk about it.

Representation

Artefacts (objects such as my backpacking list) that we offload onto the cognitive environment must be meaningful to organise our minds and increase our powers. My backpacking list reminds me to pack my 'bivy bag'. This phrase may be meaningless to you, but there is a representation spectrum to choose from to clarify meaning (refer to Figure 6).
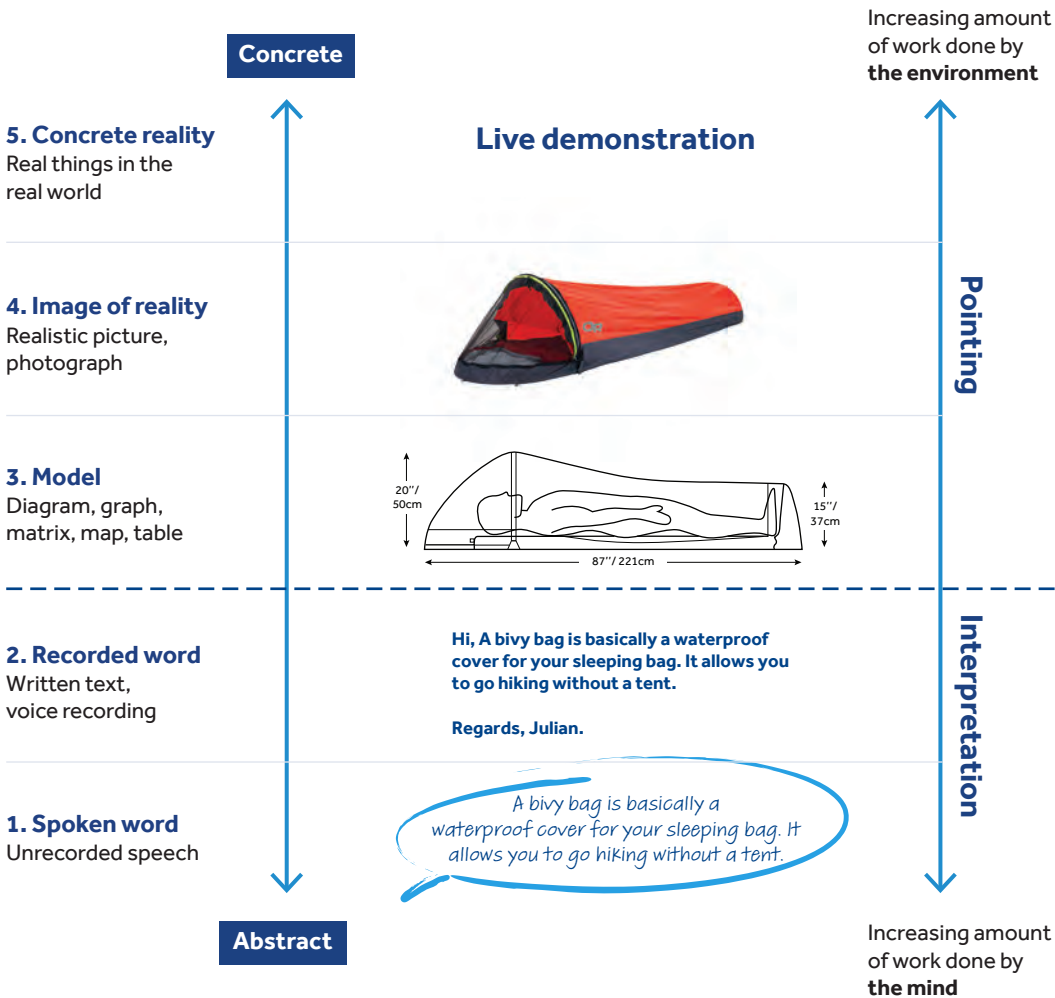

Concrete

Increasing amount of work done by the environment

5. Concrete reality
Real things in the real world

Live demonstration

4. Image of reality
Realistic picture, photograph

Pointing

3. Model
Diagram, graph, matrix, map, table

20"/ 50cm   15"/ 37cm   87"/ 221cm

2. Recorded word
Written text, voice recording

Hi, A bivy bag is basically a waterproof cover for your sleeping bag. It allows you to go hiking without a tent.

Regards, Julian.

Interpretation

1. Spoken word
Unrecorded speech

A bivy bag is basically a waterproof cover for your sleeping bag. It allows you to go hiking without a tent.

Abstract

Increasing amount of work done by the mind

Figure 6: Representation spectrum
Source: Own draft

If my bivy bag is close by, I can give a live demonstration, otherwise I can tell the individual about it verbally. Moving from level 5 at the top of the spectrum to level 1 at the bottom of the spectrum is a movement from concrete reality to abstract words. When we are dealing with concrete reality, the environment does most of the cognitive work for us because we can see and touch the bivy, but spoken word requires interpretation to conjure up understanding. Level 2 (e.g., an email) allows rereading, relieving us of the cognitive burden of remembering the words. As we move up the spectrum over the dotted line to level 3, you see a diagram, a model of the bivy, which gives us something in the cognitive environment to point at to manage attention and facilitate learning. To facilitate means to make things *possible or easier*. Level 4 shows an image of reality, a photograph of a bivy. We might assume that the closer we get to concrete reality, the easier it is to make sense of things, but this is not always the case because reality is often confusing.

In complex situations, we need representations that make it possible or easier to learn in order to create manageability.

When concrete reality confuses us, creativity is required to design models representing deep simplicity sufficient to organise our minds. The level-3 diagram shows a model of a bivy in deep simplicity, indicating scale, which is probably the most important thing to understand, which is not immediately evident in the level-4 photograph. A bivy is claustrophobic and the diagram organises the mind clearly on this feature. When Hutchins (2000: xvi) claimed that the 'environments of human thinking are artificial through and through' (see Figure 4), this is what he is referring to. The diagram of the bivy is artificial, yet it organises our minds powerfully and facilitates rapid learning.

Coherent representation

According to Hutchins (2000: xvi) and as mentioned in Figure 4, performance is leveraged by the ability to 'propagate a representational state in the face of a series of disruptive events'. Learning how to play a song on the guitar requires coherence between a variety of representations on the representation spectrum (refer to Figure 7).
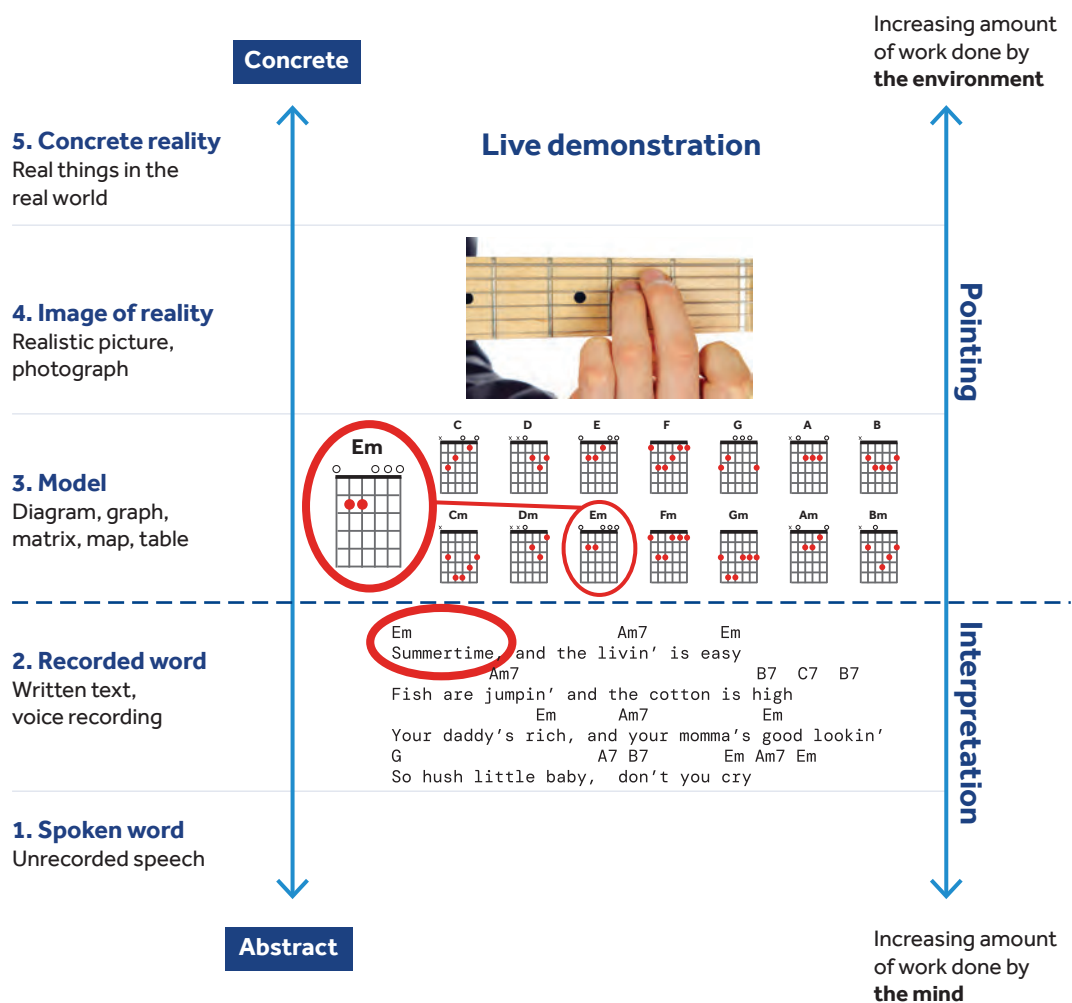

Concrete

Increasing amount of work done by **the environment**

5. Concrete reality
Real things in the real world

Live demonstration

4. Image of reality
Realistic picture, photograph

Pointing

3. Model
Diagram, graph, matrix, map, table

2. Recorded word
Written text, voice recording

```
Em                   Am7         Em
Summertime, and the livin' is easy
     Am7                     B7  C7  B7
Fish are jumpin' and the cotton is high
          Em       Am7           Em
Your daddy's rich, and your momma's good lookin'
G                  A7 B7        Em Am7 Em
So hush little baby,  don't you cry
```

Interpretation

1. Spoken word
Unrecorded speech

Abstract

Increasing amount of work done by **the mind**

Figure 7: Propagating a coherent representational state
Source: Own design

45.

Figure 7 shows how I learnt to play guitar. In the early days, I could not read music, but if I knew a tune in my head, I would be able to sing it, provided I remembered the words. Offloading words from our head onto the environment – that is, writing them down – constitutes a move from level 1 to level 2 on the representation spectrum. Figure 7 outlines the lyrics for 'Summertime', a well-known jazz standard. To play 'Summertime' on my guitar, I need to remember the chords. I have circled the first chord, E minor, represented as the symbol Em.

A chord chart is a common way of representing guitar chords and provides a level-3 model showing where to place your fingers on a guitar fretboard to play a particular chord. I learnt to play Em in this manner. Figure 7 shows what it looks like when somebody is playing Em on a guitar, a level-4 image of reality. If you were learning how to play guitar, you would be able to choose whether level 3 or 4 suits you best, but I find the deep simplicity of the chord chart organises my mind more efficiently than the photograph. I learnt to play many tunes this way because of coherence between the three modes of representation. The level-3 chord chart organises the mind, enabling seamless movement up and down the representation spectrum from abstract words and symbols through to concrete performance in reality.
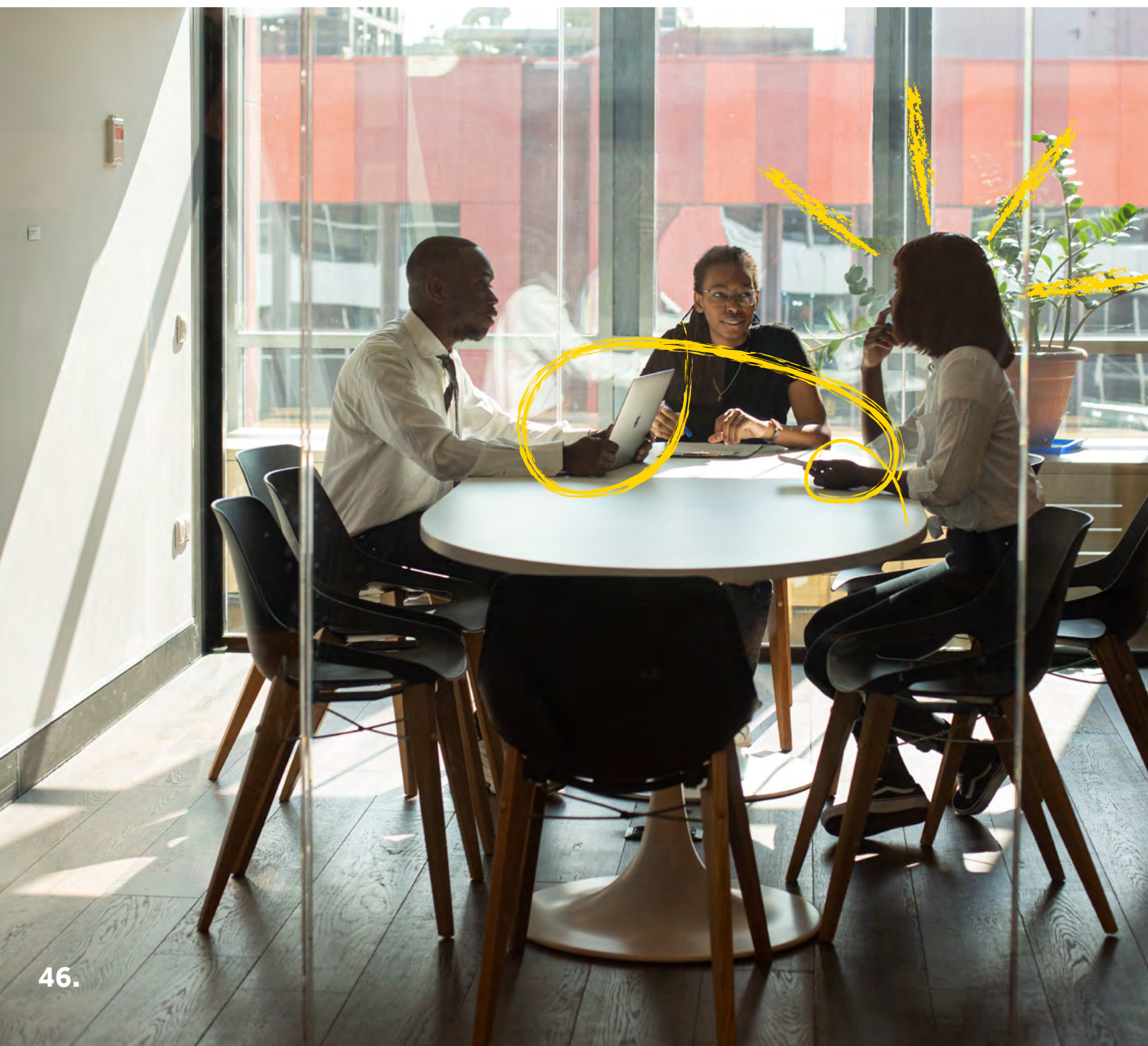
Representation crisis

Collaborative projects can be plunged into unmanageability through a representation crisis. I experienced this in a jazz band where we used *The Real Book* to organise our musical collaboration (see Figure 8).[1] The ability to represent music in symbolic form is a stunning human achievement, but requires investment in time to learn how to read music. *The Real Book* enabled us to achieve a workably *accurate understanding of each other's minds*, sufficient for each person to play their part and perform as a group. All was well until our keyboard player left the band.

The Real Book for Keyboard and Guitar

Anna's Sheet Music

Figure 8: Representation crisis
Source: Own design

---

1 Since the 1970s, The Real Books have been the best-selling jazz books of all time, but were never formally published or distributed.

Anna, keen to join the band, was recommended by a local jazz club. We agreed to meet and I took *The Real Book* and my saxophone with me. Anna had been playing piano since she was a young girl and in recent years had become a jazz fanatic like myself. Everything seemed perfect until we started playing together. She was puzzled by *The Real Book* because she could not 'see the chords'. I had no idea what she was talking about. At the jazz school that I attended, *The Real Book* was universally used by everyone and was the essential book you needed to play in any band at the school. How did Anna's sheet music differ from the lead sheets in *The Real Book*? Figure 8 shows her question.

Anna showed me her sheet music for 'Summertime' – for every line of music in *The Real Book*, she had two additional lines, enabling her presumably to 'see the chords'. Anna was classically trained and could read music extremely well, and I began to realise

she had learnt music in a completely different way to our original keyboard player. I realised he must have learnt to play the keyboard the same way I learnt to play the guitar. The first chord in this version of 'Summertime' is Am7. Our original keyboard player must have learnt the chord fingering directly on the keyboard, whereas Anna needed to see all the notes written out in order to play it.

We now had a representation crisis. Our lead sheets would not be sufficient for Anna and our band to achieve *a workably accurate understanding of each other's minds*. Bands are complex and difficult to manage at the best of times, but become impractical and unmanageable when people cannot read music. I was sure that Anna was the right person for our band, so we needed to resolve the representation crisis. Figure 9 shows how we managed *to propagate a coherent representational state in the face of a disruptive event.*
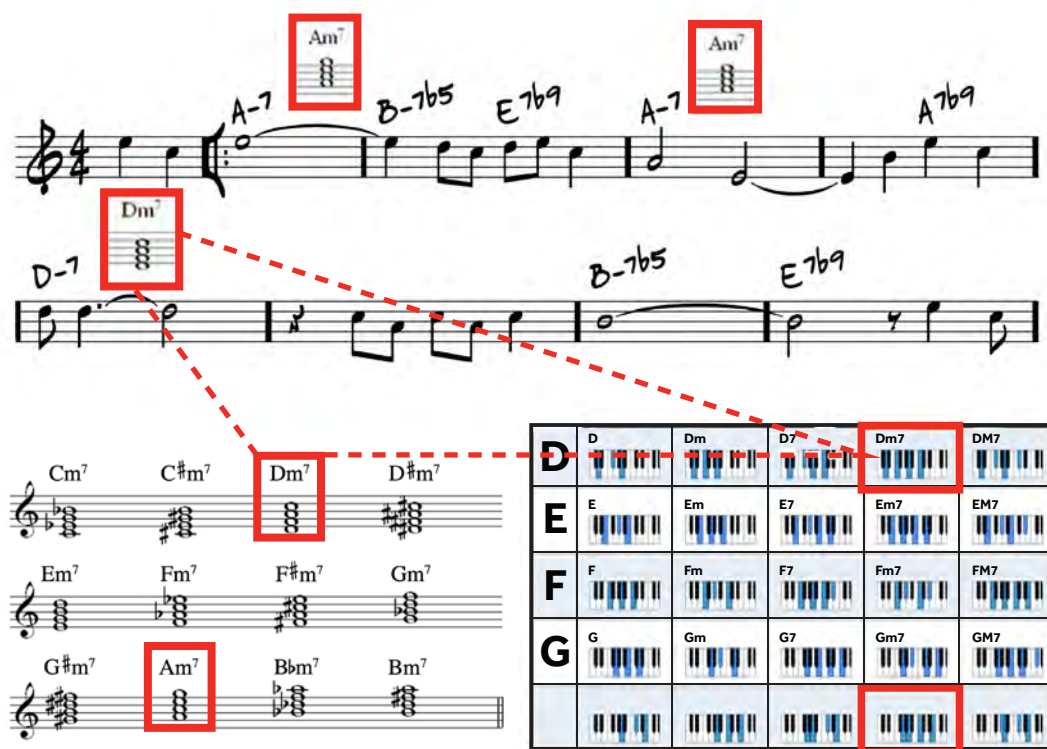

Figure 9: Resolving a representation crisis
Source: Own design

I wondered if there were chord charts for piano that performed a similar function to chord charts for guitar, as represented in Figure 7. Sure enough, we found two useful modes of representation. The chord chart (see the bottom left chart in Figure 9) shows, for example, the four notes that make up the chord Dm7. The piano chord chart (refer to the bottom right chart in Figure 9) shows the corresponding fingering for each chord on a keyboard.

Therefore, Anna can see how the notes of Dm7 from the chord chart translate to Dm7 fingering on the keyboard. Whenever Anna sees the symbol Dm7 on a lead sheet, she can write out the notes next to it in the same format as the chord chart. She will then be able to 'see the chords' as she plays. Figure 9 shows her beginning to represent chords on the lead sheet for 'Summertime', including the chords for Dm7 and Am7.

Our band became manageable because we resolved the representation crisis. Nevertheless, it did require additional investment in time to *continually propagate a coherent representational state.* Instead of simply arriving at practice sessions and playing randomly from *The Real Book*, we had to agree and commit to what we were going to play before we arrived, and Anna had to commit to re-representing her lead sheets ready for the next practice session. As per the manager's action learning model (see Figure 3), having made the situation manageable, we still needed to manage it by *committing to action*, remembering that however excited we are about decisions, they do not miraculously implement themselves.

Conversation systems

If, as Boulding (1956: 45) stated, 'the study of man is the study of talk' (refer to Figure 4), then we need a notation to study conversation systems so we can make the 'tenuous web of conversations' more manageable. If a system is a collection of parts that interact to function as a whole, then it is not difficult to conceptualise a band as a conversation system. Band members (i.e., the parts) interact via conversation to perform jazz. More difficult to conceptualise, a paradigm shift is to conceptualise various conversations as parts of a conversation system interacting via their cognitive environment. Figure 10 represents ongoing management of a band as four interconnected conversations – the first column shows *who is talking* and the third column shows *what they are talking about*.

Who will talk?	What will we take into the conversation?	What will we talk about?	What will we take from the conversation?
Julian Frik Anna Piet	**1a. Repertoire file** **1b. Practice file** 1c. Real book 1d. Photocopier 1e. Diaries	1. What new music do we want in our repertoire? **Commit to:** new numbers we want to practice	**1b. Practice file (+ new numbers)** 1e. Diarised practice session + to-do list
Julian Frik Anna Piet	**1a. Repertoire file** **1b. Practice file**	2. What numbers are we happy to perform in public? **Commit to:** numbers that are now ready	**1a. Repertoire file (+ now ready numbers)** **2a. Demo tape**
Julian Gig host	**1a. Repertoire file** **2a. Demo tape**	3. Do you want us to play a gig? **Commit to:** agreed gig requirements	3a. Gig details
Julian Frik Anna Piet	**1a. Repertoire file** 3a. Gig details	4. What numbers will we play at our next gig? **Commit to:** sets, play sequence, logistics	**4a. Gig file** 4b. Gig logistics + to-do list

Figure 10: Conversation system
Source: Own design

There are many different ways to talk in a situation – some more productive than others. Conversations become productive when people learn quickly and commit to specific outcomes, so it makes sense to design them deliberately as learning conversations. Each conversation asks participants to commit to a specific answer to the conversation question.

Thus, every conversation begins with a question and ends with a commitment. The band has recurring conversations about:

1. What music do we want to play?
2. What music are we ready to perform in public?
3. Does anyone want to hear us play?
4. What music will we play at our next gig?

The second column in Figure 10 shows the cognitive environment that structures the conversation. This represents Hutchins's (2000) *artificial environment that gives people their powers.* Only tangible artefacts that are *taken into the conversation* and are physically present during the conversation are included in this column. Thoughts in my head that are verbalised during the conversation but never offloaded – in other words, level 1 on the representation spectrum – will *never* appear in the second column. Recorded thoughts, models, images of reality, and physical artefacts – that is, level 2 through level 5 on the representation spectrum – can appear in the second column. These artefacts should be carefully designed to organise intelligent thinking, thus structuring meaningful conversation and facilitating commitment. Similar to the second column, the fourth column represents any artefact produced by the conversation or amended during the conversation.

A verbal commitment that remains inside people's heads as they leave the conversation and is never offloaded into the cognitive environment will not be represented in the take from the conversation column.

In Figure 10, I have colour-coded various artefacts in the cognitive environment to make it easier to understand how conversations interconnect and interact with each other. In conversation 1, the repertoire file (blue) enters the conversation system. You can see that it is used to structure all four conversations, that it is updated in conversation 2, the conversation where the band agrees that a number is now ready to be performed in public and can move from the practice file (red) to the repertoire file. The repertoire file is labelled '1a' because it made its first appearance in conversation 1 and it keeps this label throughout. This means that you can always trace any artefact back to the conversation where it first appeared in the conversation system.

A good way to make sense of the conversation system is to view it as a movie script:

- Imagine the band in **conversation 1** looking through *The Real Book* for new numbers that they want to play, looking at their current repertoire file for gaps in their repertoire, and photocopying and filing lead sheets of numbers they want to practise in the next session in the practice file. Having diarised the next session and noted anything else they need to do, they practise their parts individually in preparation for the next practice session.
- Imagine **conversation 2**, where the band members record themselves while trying to get new numbers to a level where they are ready for public performance. If they are happy with what they hear, they move the lead sheets from the practice file (red) to the repertoire file (blue), and the recording becomes a demo for other people to listen to.
- Imagine **conversation 3**, where Julian is talking to potential hosts, sharing the repertoire and allowing potential hosts to listen to demo tapes to help them decide whether to hire the band. Rather than remembering details of the gig, they are written down.
- Finally, imagine **conversation 4**, where the band creates a gig file (purple) by temporarily moving lead sheets from the repertoire file and sequencing them in order of play so that everyone is 'on the same page' during the performance.

The conversation system represented in Figure 10 shows *deliberate design* of the cognitive environment surrounding each conversation, that artefacts created or changed in one conversation become the artificial environment that organises thinking in subsequent conversations.

If group performance is about propagating a coherent representational state, then the collaboration must be designed deliberately.

Small world networks

To understand Strogatz's (2003: 251) claim that 'anything that can spread will spread more easily and quickly in a small world', (see Figure 4), we need to understand the architecture of small world networks. Figure 11 contains two networks with black dots representing nodes and lines, which show how nodes are connected in a network. There are numerous types of networks, but for our purposes, the nodes represent people, more specifically the minds of people. Both networks have identical nodes, but they are connected differently resulting in different architectures.

A regular network looks like a fishing net, each node making a few connections to other nodes. The small world network has a different architecture dominated by three highly connected hubs (coloured red). A wide variety of networks self-organise into small worlds on a rich-get-richer basis because of the benefits of connecting in a hub (Buchanan, 2002: 87). Airline routes, for example, form small worlds because of the attraction for a small airport to connect to a major international airport, thus becoming connected to the whole world (Buchanan, 2002: 129).
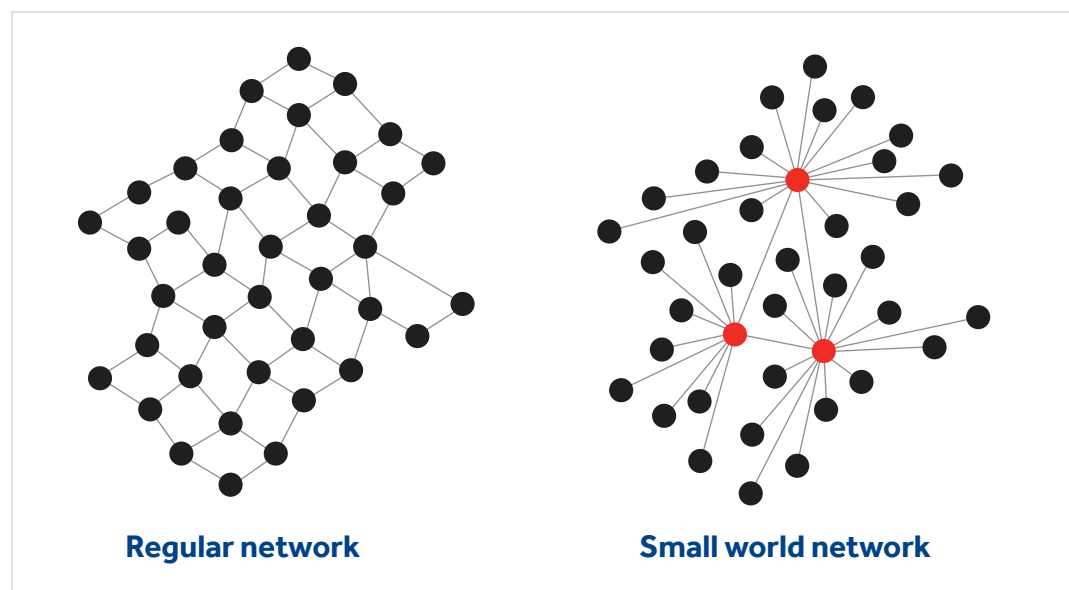

Regular network   Small world network

Figure 11: Small world network
Source: Own design

Epidemics struggle to spread in a regular network because each node can only infect a few other nodes, so they tend to fizzle out. Epidemics are almost inevitable in a small world when highly connected hubs become infected. Hubs are superspreaders. Metaphorically, we want contagious, superspreader manageability where a *workably accurate understanding of each other's minds* rips through the network like wildfire.

The world of music is vast and contains many forms of life. There are several different types of music and many musicians with diverse language games, as we saw when classically trained Anna joined our jazz band. 'Summertime' can be played in various keys and represented in numerous ways, such as guitar and harmonica tabs (refer to Figure 12). To compound things, when I play the note C on a tenor saxophone, the note that is heard is a B-flat, and C on an alto saxophone sounds like an E-flat. Our jazz band needed three different versions of The Real Book to play in harmony.

When I describe the world of music in this way, I am describing a regular network (see Figure 11). Many musicians in this network do not share a *workably accurate understanding of each other's minds*, which makes it difficult to connect. I can have meaningful conversations with a few amateur guitarists at the local folk club, but I cannot perform with them because I cannot read their music. Consequently, attempts to collaborate soon fizzle out.

Figure 12 shows how the jazz school I attended created a small world and was successful in creating a w*orkably accurate understanding of each other's minds. The Real Book* is a vast compendium of jazz standards, represented as lead sheets, perfectly synchronised for instruments

usually needed in jazz. Obviously, people have different levels of proficiency, so bands perform at different levels, but eventually individuals reach a level where they can sight-read and play almost anything immediately.

If a mind is represented as a node, then something offloaded from a mind into the cognitive environment can also be represented as a node. An appealing new song that jazz musicians have in their heads is unlikely to become contagious, but a song offloaded into all three *Real Books* will infect the whole jazz school like an epidemic. *The Real Books* are superspreader hubs in a small world network (see Figure 12). Tenor saxophone, alto saxophone, and keyboard players connect easily and quickly because their Real Books are harmonised, thus interconnected as a backbone capable of propagating a coherent representational state for every node in the network.

The conversation system represented in Figure 10 makes an important distinction between *who will talk* (column 1) and *what they will take into the conversation* (column 2). I believe that however intelligent and knowledgeable people may be, their minds alone are unlikely to become a hub in a small world network. Column 1, in effect, represents level 1 in the representation spectrum. It is difficult to see inside somebody's head, it takes time to listen and interpret what they say, and it is easy to forget or misinterpret their words. Column 2 asks for the deliberate design of the cognitive environment to accelerate *a workably accurate understanding of each other's minds.* Ideally, the cognitive environment (columns 2 and 4) is deliberately designed as a small world to create contagious manageability.
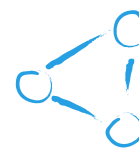
Summertime guitar tabs

```
8   7   8     -8    7   -8   8   7   -6 5
Summertime and the living is easy
 8     8   8 -8 -8
Fish are a-jumpin'
7    -6    7 -6    7   -7
And the cotton is high
 8     8   7    8     -8
Your daddy's rich and
  7    -8 8    7     -6  5
Your mama's good looking
5    6      5  6   -6 7  8-8     7 7 7-6
So, hush, little baby, don't you cry
```

Summertime harmonica tabs

Keyboard, guitar, bass, harmonica

Tenor saxophone, soprano saxophone, clarinet
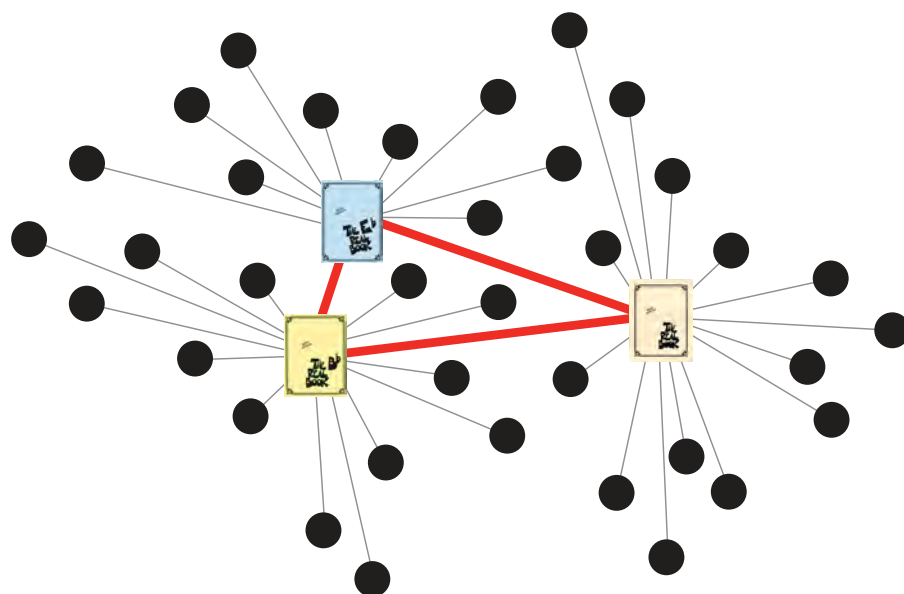

Alto saxophone

Figure 12: Small world collaboration network
Source: Own design

Paradigm shift

Because there is nothing so practical as a good theory, I am able to use my theory of collaborative projects to inform and develop various methodologies, but these methodologies are outside the scope of this paper (Day, 2019). Instead, it is interesting to see whether the theory alone is practical and useful in its own right.

If projects are the engine rooms of our organisations, can we use the theory of collaborative projects to diagnose why there is persistent project failure so that we know how to improve organisational effectiveness?
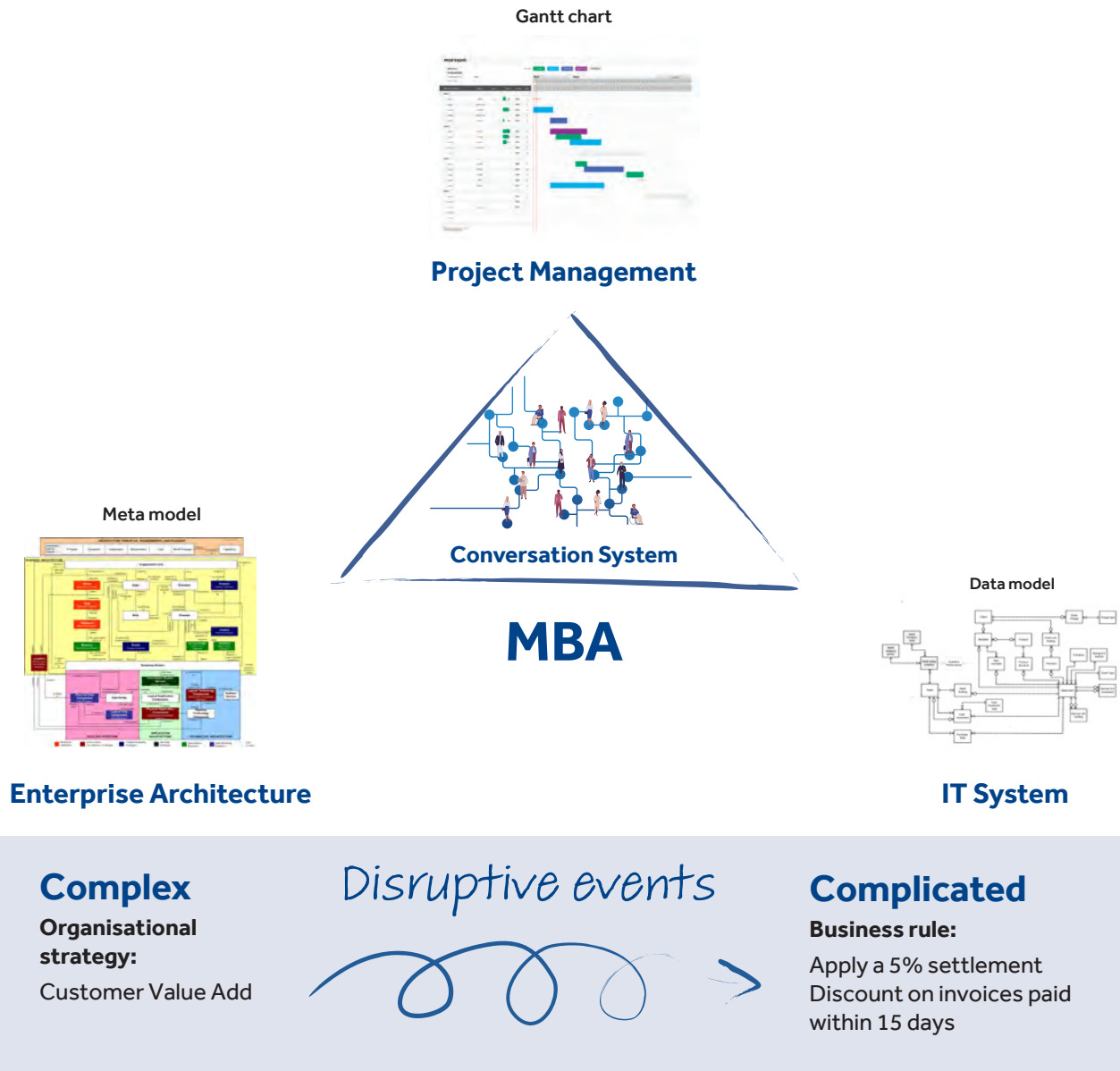

Gantt chart

Project Management

Conversation System

MBA

Meta model

Enterprise Architecture

Data model

IT System

Complex
Organisational strategy:
Customer Value Add

Disruptive events

Complicated
Business rule:
Apply a 5% settlement Discount on invoices paid within 15 days

Figure 13: An organisational project
Source: Own design

Figure 13 shows a typical organisational project that begins with strategy and ends with business rules programmed in an IT system. Typically, this would be viewed as a process, but the organisation is represented as a conversation system. This is a major paradigm shift and changes the language game. The paradigm shift is represented in the action learning model where *commitment drives* action (Figure 3), emphasising that we make shared commitments to shared goals in human conversation.

The dominant language game of mainstream project management is action planning, whereas the language game of collaborative projects is conversation design.

Imagine that all stakeholders in Figure 13 are fully accredited professionals in their respective fields, including executives who might hold MBAs. On the surface, it looks as if the organisation is well equipped to make a success of its project. Practical theory should prompt useful questions.

A basic question is whether everyone understands the difference between complicated and complex? Complicated situations are puzzles with right answers that can be established with knowledge and logic. Complex situations are problems with no right answers that can be resolved by reaching an agreement via collaborative conversation. Agreeing to a strategy to add customer value is complex, whereas programming a settlement discount rule into an IT system is complicated but completely manageable by IT. Complicated situations need clever solution providers, while complex situations need wise facilitators. Do the certified professionals in Figure 13 understand the role of facilitation in complex situations? Even though intelligent people get together to talk, there is no guarantee that they will have an intelligent conversation. Is there anyone in the organisation skilled in conversation design and facilitation?

IT specialists are competent in the complicated aspects of systems implementation, but struggle with the complexity. Delegating complexity to IT is high risk. Do executive decision-makers in an organisation fully understand this risk and how to manage it?

If we observe dysfunctionality, then we suspect a representation crisis. For strategy to be viable, it must be integrated into systems architecture. This involves conversation between executives and enterprise architects who are responsible for the evolution and integration of the entire systems platform supporting the whole business process. Their abstract metamodels are a private language game of mesmerising complexity that a senior executive once described as 'an eye-strain document', a similar reaction that I had to Anna's sheet music. If executives and enterprise architects cannot have an intelligent conversation, then the project in Figure 13 has got off to a rocky start.

Gantt charts epitomise project management, but do they suffer from a representation crisis? These charts are excellent for representing the sequence in which activity should be done – the critical path – to achieve milestones. They work well for complicated projects like construction and engineering, but lose traction in complex projects where the main challenge is agreeing 'what we want', rather than 'how to get things done'. In many projects, activity sequencing is not the main challenge, for example, managing a band.

If Gantt charts are a hammer, there is danger in treating every project as if it were a nail.

The paradigm shift from project as action planning to conversation facilitation exposes my main reservation about Gantt charts. If my job is to turn around a failing project, I want to know the status of commitments that drive action. Who intended to act? Who made a commitment to act? Have these commitments been honoured? The Gantt chart shows the plan, not the commitments that make plans come true. We should not confuse planning with management.

The foundation of most IT systems is a relational database that stores data. To design these databases, IT systems analysts need to talk to business people about their data architecture. I know from bitter experience that data models used by IT are practically incomprehensible not only to businesspeople, but to many IT professionals as well. Eventually, I found some creative, non-standard ways to resolve this representation crisis, but this requires significant investment in time and effort. At this stage, we can see that the project represented in Figure 13 is likely to be dysfunctional and unmanageable.

Organisational effectiveness

This raises important questions for executives responsible for organisational effectiveness:

• If projects are the engine room of our organisations, how do we resolve these representation crises?
• If organisational projects persistently fail, should executives learn the relevant language games?
• If I want to perform in a band, I have to invest considerable time in the language game of music. In the same way that executives learn the language game of strategy, marketing, finance, operations etc. on their MBA, do they need to invest in the language game of enterprise architecture, project facilitation, and data modelling? We have now experienced at least four decades of persistent IT project failure, so perhaps there is no longer a choice.

This suggestion may seem overwhelming and impractical. Consequently, the next question is whether we can creatively re-represent these representations in deep simplicity so that people can reconnect and create contagious small world manageability? Anna's sheet music was 'an eye-strain document' that was elegantly re-represented in lead sheets, so there was no need for our band to learn classical music. If professionals spent time thinking about the cognitive environment of conversations they need to design and facilitate, could they accelerate a workably accurate understanding of each other's minds?

Perhaps the most basic question of all is whether the three disciplines highlighted in Figure 13 are founded on solid theory? We know that mainstream project management is not.

If a methodology claims that it, for example, has seven key principles, are these really principles in the true sense of the word, or merely method in disguise? Will people who know how, really understand why, especially when negotiating an unforeseen, disruptive event?

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Deliberate
collaboration

Copyright and confidentiality

From strategy to Playbook

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Henley
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You and your team have worked hard to develop a strategy to secure your company's growth.

Now the challenge is getting your whole team to make astute decisions in real time on a playing field that is continuously changing. For that, your company needs a playbook.

Abstract

Strategy formulation is the widely accepted approach to preparing an organisation for the future. Yet the hours of contemplation and brainstorming by the company's most senior leadership seldom yield an outcome that supports or drives tactical decision-making.
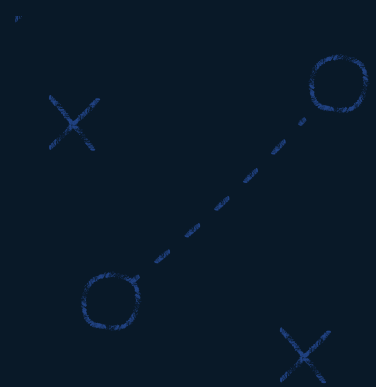
Based on practical experience, this paper indicates how a formal document can be turned into a lived experience, where all team members in an organisation are empowered to support the strategic vision and navigate the changing market conditions effectively to keep the company on course.

Suggestions are made for the incorporation of a playbook, which refers to an indispensable decision-making guide that is continually updated as the company grows and the leaders learn. A good company playbook integrates four elements that make up the CAFE Framework™: Clarity, Accountability, Focus, and Energy.

Clarity is about the three Ps that make up the business DNA, the key to astute decision-making; accountability invites all employees to take appropriate ownership, with the kind of support that sets them up for success; focus points everyone in the right direction, with real-time feedback on the impact of tactical decisions; and energy encourages everyone in the organisation to make a meaningful contribution, freeing up the company leadership to look ahead.

Acknowledgements

Contents

Disclaimer:

Introduction

A company strategy that maps out **the company's future** is an important document for investors and strategic planners, but can be intimidating for the managers and team leaders who are expected to translate the strategy into reality.

This document takes you on the journey from conception to the application of a guide that shares with your employees what you have in mind to reach new heights in your company.

By **developing, implementing, and maintaining** a unique playbook for your organisation, you can empower employees to think for themselves and make good decisions, rather than constantly hovering over their shoulders to check they are thinking like you.

By using the framework presented, you can stop fretting over poor decision-making, a lack of ownership, and misguided priorities. Instead, you provide the context for everyone in the company to contribute meaningfully and accomplish something remarkable together, knowing that the result will delight your shareholders.

Empower employees to make good decisions.
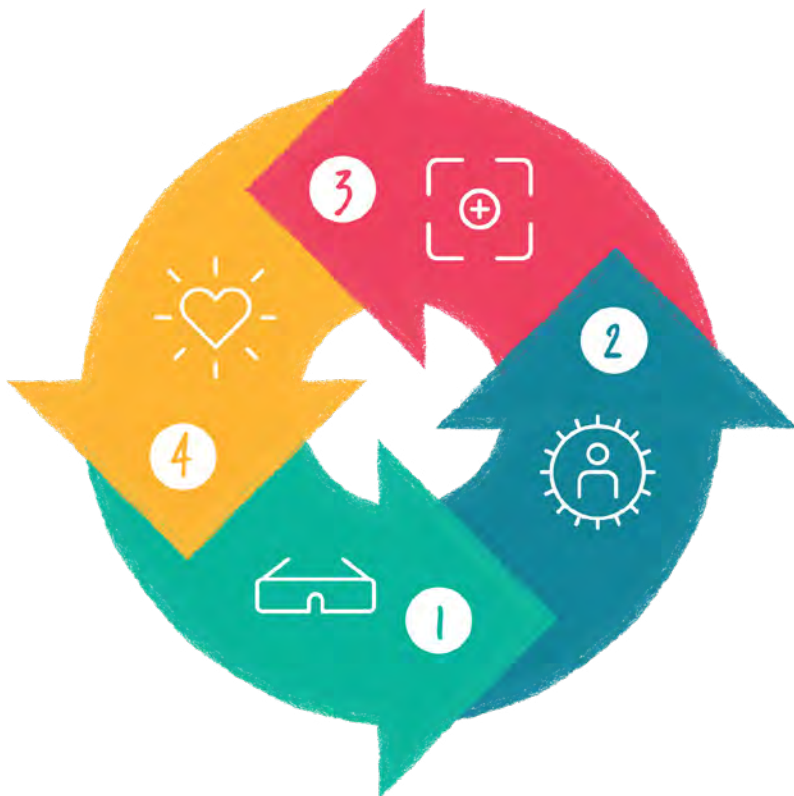
Strategy has its place

In the 1990s, we used to rely on map books to get to business meetings in unfamiliar districts. Finding a new client's office required driving down streets looking for street signs and comparing them to what was on the map, open on the passenger's seat. Then, when one found the street, the next challenge was looking for street numbers on buildings to figure out how far one still had to travel to get to the client, and in which direction. While moderately effective, this method was fraught with risks, the most significant of which was taking one's eyes off the road to squint at labels on a street map.

Street maps still have their place. Town planners, property developers, estate agents, and emergency services rely on them to provide clarity for planning purposes. However, those of us on the road are far better served by navigation services that not only tell us exactly where to turn, but also update directions based on traffic density, alert us to road hazards, and provide options for a quick bite to eat or to fill up the petrol tank nearby.

Similarly, strategy has its place. For any business with ambitions for the future, it is helpful to get the leadership team together to reflect, compare notes, and

consider how best to achieve that Big Hairy Audacious Goal, or BHAG, that Collins and Porras (2005: 226) defined as a 'unifying focal point of effort'. Strategy is good at capturing high-level approaches agreed by executive leadership. An example is whether the company will look to achieve growth organically through ongoing efforts to drive sales and optimise operations, or incrementally through acquiring smaller companies with attractive market share, offerings, or intellectual property.

Get the
Leadership
Team
Together

Why strategy often gets a bad rap

Much has already been written about why strategies fail. The most widely quoted strategy statistic is that nine out of 10 strategies fail, which originates from an elusive Fortune magazine article titled 'Corporate strategists under fire' by former editor Walter Kiechel III (Jones, 2012). While the article itself is hard to find, Kiechel (2010: 172) referred to the article in his book The Lords of Strategy.

Whether or not it can be proven that so many strategies eventually fail, even expert strategists concede that strategies do not consistently deliver the expected results. Kiechel (2010: 172) reported that each of the consulting firms he interviewed for his article acknowledged, on condition of anonymity, that less than 30% of their clients implemented the strategies they helped to craft.

A global survey of 583 executives, half of whom were C-suite executives and the other half senior managers, revealed that most of these companies fall short in the area of strategy implementation, even though they acknowledge its importance (The Economist Intelligence Unit, 2013). Interestingly, respondents identified leadership buy-in and support as the most important contributors to successful strategy implementation. However, only half of the executives believed that there was appropriate C-suite attention to making strategies happen.

In another study, researchers conducted 40 experiments to see how changes in companies would impact strategy execution (Sull et al., 2015). Initial indications were that pervasive myths get in the way of strategy execution. Despite evidence to the contrary, many managers still believe the key to successful strategy execution is a bureaucratic blend of alignment, compliance, top-down communication, and the old favourite, a 'performance culture'. McChesney et al. (2012: 12) concurred, indicating that – despite communication efforts – employees lack an understanding of the strategy and how to implement it, companies do not monitor progress, and no direct incentive or accountability exists for the implementation.

The picture, then, is one of executives not following through on the plans they have created, and managers left believing that success will come if everyone just pays attention and toes the line. One could bemoan the inconsistency of executives or the inadequacy of strategy, but perhaps a more constructive approach would be to consider the perspective popularised by Eli Goldratt, the physicist who applied his fundamental system of beliefs to management theory, delivering controversial and often counter-intuitive perspectives on business success. Goldratt, in his characteristically irreverent tone, once said 'Tell me how you measure me and I'll tell you how I will behave' (Goldratt and Goldratt- Ashlag, 2010: 43).

Perhaps it is not that difficult to understand why successful executives focus their attention on tracking and addressing dynamic market changes, rather than monitoring the implementation of a strategy devised long before those changes occurred. Expecting a strategy to deliver dependable results despite unpredictable market changes is a bit like depending on a street map to get to a client on time despite unpredictable traffic changes.

Pervasive myths get in the way of strategy execution.
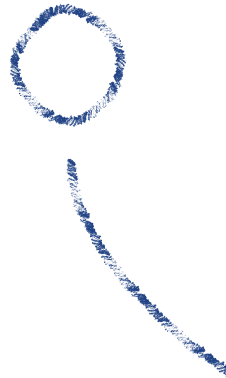
Adopt the idea of a playbook

In sports, a playbook is the key to success, translating the team's strategy into practical tactics that can be translated into moments of brilliance in the heat of the moment because everyone on the team can read the game and knows which part to play (Bach, 2021). In business, a playbook can similarly empower leaders – from executives to first-time team leaders – to make astute decisions in real time, because they have answers to the most important questions about their business and they understand what to look out for in the business. Making these insights available to every leader in your organisation is key to developing the organisational agility required to navigate a fastchanging market.

While all employees are invited to share the company vision and all leaders in the company have access to the company strategy, very few are adept at tactical decision-making, perhaps because they are simply not asking the right questions. Good tactical decision-making contributes more to company growth than good planning. As Buckingham and Goodall (2019: 45) stated, 'Plans scope the problem, not the solution'.

A playbook has the answers to the most important questions.
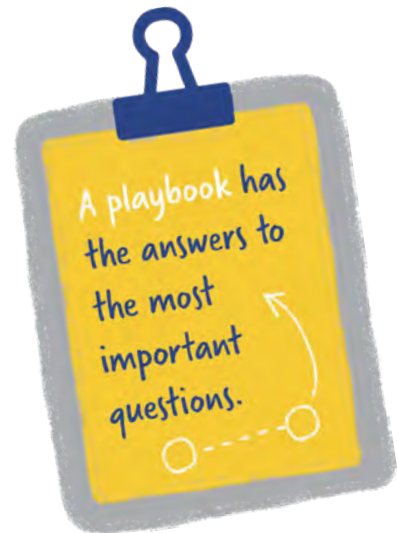
Drafting your company's unique playbook

What is a playbook?

Your playbook is unique to your organisation. It contains not just the recipe for your organisation's 'secret sauce', but also clarifies the key roles in the kitchen and how to ensure that the 'sauce' remains both irresistible to your customers and tantalising to new markets. Most importantly, your playbook contains your organisation's approach to ensuring that everybody's contribution is valued and appropriately rewarded. Experience gained from 12 years engaging with corporate leaders across several market sectors, through facilitating strategy, teamwork, and leadership development, indicates that leaders just need to attend to the four key elements of Strategy Activator's CAFE framework™, to handle the heat in the kitchen and keep that secret sauce coming:

1. Clarity
What makes us who we are?

2. Accountability
How do we get everyone to own the outcome?

3. Focus
How do we know we are really contributing?

4. Energy
How do we inspire everyone to really show up?

The CAFE Framework™

1. Clarity
What makes us who we are?

Founders and CEOs are often the envy of senior executives and team leaders because they seem to intuitively understand how to make the right decisions under pressure. A good friend of mine is the chief people officer in a leading financial institution and he shared this account. He explained that, while they have got some excellent leaders in senior management, often when senior leaders meet to discuss a pressing issue, the CEO will look in, pull up a chair, and listen to the discussion. After five or 10 minutes, the CEO will ask a question that will have everyone else in the room looking at their shoes. The reason for this is twofold. First, no one at the table has a good answer. Second, they realise that the CEO's question is pivotal to finding a solution and they are all asking themselves why they, already an hour into the meeting, have not asked the same question. It is not that the executives are unclear on the strategy, but they are typically just unclear on how to apply the thinking behind the strategy to the current, unexpected challenge.

The most important role of any leader is to provide clarity. Lencioni (2012: 15) maintained that communicating clarity is not only the second most important discipline of a leader, but also the third and fourth most important discipline. **Clarity is more about the questions your leaders ask than the answers they give** because, as Dalio (2017: 414) put it, 'great questions are a much better indicator of future success than great answers'. From experience, the questions that lead to the kind of clarity that matters, are about three Ps. Together, your purpose, principles, and promises make up the business DNA – a reference point for all decisions in your company.

Primarily, your company needs a clear **purpose** - a strong sense of why something is important and why you should keep going. Sinek (2009: 68) believes that this is the most important question for individuals and organisations alike, as the answer - more than anything else – is what inspires others to take action. This forms the core of the business DNA, and if you are going to build a strong team that contributes meaningfully to company growth, despite all the challenges, barriers, and distractions along the way, then you and your team need to know and relate to a purpose. Mackey and Sisodia (2014: 46) explained company purpose as both the glue that holds the organisation together and the magnetic force that attracts the right employees, customers, suppliers, and investors. Not to be confused with your mission, purpose is not so much what you are determined to do, as the reason why you are determined to do it. It is a sense of knowing and understanding the value of the work that you do. This is what gets you out of bed in the morning and what keeps you going when your plans backfire.

- Once the purpose has been established, you need to clarify the **principles** that will hold your leadership team together and empower all decision-makers in the company to support them. Most companies have a set of values and values have their place. However, from experience, company values do not drive decisions under pressure. To build an effective, flexible, and resilient team, clear principles are a necessity. These are the deeply held beliefs that will inform your decision-making. They are the non-negotiables for the way you and your fellow executives engage with others, and the way you lead. If you consistently apply these principles in your decision-making, the people you lead will find it easier to follow your example (Dalio, 2017: 100). Equally, if

your company leaders are cohesive and consistent in their decision-making, your key stakeholders will discover what you stand for as a business.

- Once your purpose and principles are clear, you need to clarify who really matters in your business and what you **promise** to each of these stakeholder groups. This is not about your offering, but about what your offering will do for your customers. Miller (2017: 128) emphasised that every prospect should be clear on where you want to take them. Customers may buy products and services from you, but they will only become loyal when they see that your company fulfils your promise to them consistently over time. Sisodia et al. (2003: 21) referred to this as the emotional contract, mostly explicit or unspoken, that articulates what stakeholders 'want to experience, and what they want to avoid experiencing'. Chouinard (2016: 102) and his team provide an 'ironclad guarantee' that goes with every product they make, believing that a Patagonia product should be 'identifiable even from a distance by the quality of workmanship and attention to detail'. According to Reichheld (2011: 145), it is only once employees are inspired to promote the company that customers will become loyal. Employees may work for a salary and a bonus, but they will only become loyal when they see that your company fulfils your promise to them consistently over time. The same is true for all stakeholders. Loyalty needs consistency to grow. Practically speaking, 'promise' is a noun, but also a verb, and therefore promises require action.

2.Accountability

How do we get everyone to own the outcome?

Accountability often makes the news headlines and it is typically mentioned in the context of someone demanding that someone else be held accountable for poor results. **Accountability only works if there is a healthy discipline of reviews** – with reporting, feedback, and either rewards or consequences, as appropriate. But there is something more important than the review – contracting upfront. How many times have you found yourself in a quarterly review, discovering that your manager's picture of success was different from yours all along? While this disconnect is often labelled accountability, it is really just blame. **A courageous leader will engage team members upfront**, unpacking, and even co-designing the intended outcome.

When looking up the definition of accountability in most dictionaries, you will find something like 'to take responsibility for something', suggesting that accountability is synonymous with responsibility. In practice, there is a critical difference between the two. I have found that this confusion lies at the root of most failed strategy implementations. In essence, we take responsibility for actions and resources, and we accept accountability for outcomes.

If you reflect on recent status meetings, perhaps you will notice a distinction between those executives who report on effort and those who report on outcomes. The latter are the ones effectively saying, 'Leave it to me, I'll get it done'. Getting accountability right requires courage, curiosity, and acumen.

- It takes **courage** to give someone accountability. You are taking a risk, as you are entrusting part of your success to someone else, with no guarantees. In turn, these people will only take accountability in an environment where they feel safe, seen, heard, and respected (Brown, 2018: 12).

- To make delegation work, you need to be **curious** about what is possible. Without curiosity, you will be tempted to dictate exactly how to reach the outcome, reducing

your team to being followers of your instructions rather than being independent thinkers who contribute to your outcome. Brown (2018: 91) eloquently framed curiosity as the transformation from 'always knowing into always learning'. When you are open to new ways of achieving your intended outcome, you will begin to discover what your team is capable of. Grant (2021: 54) called this 'the thrill of not believing everything you think'.

- The third element of accountability is **acumen**, which is the ability to make good decisions and wise judgements about what aspects of your goal to delegate, and which team members to delegate to. Charan (2017: 101) unapologetically labelled decisions made without acumen as false decisions, because the people charged with reaching and acting on a decision fail to engage and connect. Without acumen, you risk setting your team up for failure, which translates into setting yourself up for failure.

Typically, the phrase 'holding others accountable' conjures up images of unleashing pent-up frustration, hauling team members over hot coals, or grabbing them by the scruff of their necks. But what if it was the kind of holding that offered reassurance under pressure, such as a steady hand giving your team member the confidence that if things are not working out, you are available as a sounding board? How might this approach improve your chances of success? Of course, you would only be willing to provide that kind of support to someone you trust enough to give the benefit of the doubt, someone you know is on the same page as you. **You are on the same page because you sat down together at the outset and checked that you both have the same picture of the expected outcome in mind, as well as the level of commitment required to get there.** This picture is the basis for an upfront contract that includes clear consequences for both success and failure to bring the picture to life (Bustin, 2014: 90).

3. Focus
How do we know we are really contributing?

This section of your playbook helps team leaders work out what they need to focus on today to achieve the anticipated outcome.

If your monthly management committee (ManCo) is anything like the many I have seen over the years, then it is a combination of presenting what happened last month and justifying results that are over a week old. Either way, there is not much time left to focus on the road ahead. If you are tired of driving your business or your team while looking in the rear-view mirror, then it is time to stop relying on your monthly ManCo meeting to guide you for the month ahead. What you need instead is for all team members to see how effectively they are contributing all the time, so that they can make informed decisions, realign where necessary, and avoid wasting company resources.

You have probably got some form of a dashboard, but the challenge with dashboards is that they often end up looking like the cockpit of an airliner, with tons of information presented in a very specific format. Unfortunately, this only means something to a very small number of people in the organisation, and even they often disagree on how to react to what they see on the dashboard.

- **What do you really need?** A visual management tool is crucial. A good one will pass this test: anyone who looks at it will immediately know if you believe you are on track to achieve the outcome you are accountable for. In other words, one look at your visual management tool will make it clear whether or not the critical aspects of your business are healthy. If they are, you can turn your attention to future growth, knowing that your business fundamentals are strong.

- **What is the value of a tool like that?** It is inclusive, not exclusive, because you want to make it easy for everyone to see the big picture. Then, people can help or support where needed, rather than be separated into silos, where they keep their heads down and hope the rumours are not real.

- **How do you build a tool like that?** You will need four key elements for a dashboard that aligns focus and drives collaboration:

1. **Indicators**;
2. **Metrics**;
3. **Threshold values**; and
4. **Responses**.

The goal of being in business is to grow annual earnings and the value of your organisation over time. Consequently, your dashboard should speak to both elements. It will require a series of conversations with your team to arrive at the right indicators – arguably the most important conversations you could have with your team.

Next, you need a metric for each indicator. For the indicators, you can quantify and identify a unit of measure, such as monthly revenue, percentage billable hours per week, or average resolution time for complaints. For the indicators that are important but cannot be quantified, you can use a rating scale to summarise, for example, feedback on projects or team energy levels. A rating out of 10 is easy to visualise, but feel free to use a scale that makes the most sense to your team.

Thereafter, you need threshold values, which are the values that, when crossed, trigger a change in status. I recommend using the RAG format – for red-amber-green – as it is simple and anyone who has seen a traffic light gets it. This does not mean everyone will agree on the performance levels represented by the three colours, so you need to get consensus in your team on the threshold value for changing from green (everything is on track), to amber (there is a problem), to red (there is an emergency). If you have not had a conversation like this before, you will probably find there is a wide range of perspectives in your team, and a great benefit of designing your dashboard in this way lies in the open dialogue with your team, surfacing different opinions and perhaps some hidden assumptions. From experience, these sessions can get quite heated, so it may be helpful to bring in a professional facilitator to guide the conversation to a meaningful outcome.

The challenge with many dashboards is that they either do not drive behaviour or there are different perspectives on how to react to dashboard readings, so they drive confusion instead of cohesion. Worse still, I have seen many situations where flashing red lights or warning messages are simply ignored, because 'that's not a big deal, it's been like that for ages, but we work around it....' The best way to combat this confusion and apathy is to agree on a standard response per threshold across the whole dashboard. You could spend hours trying to identify specific actions required for each individual indicator, but the chances are that the indicator is impacted by a situation you had not predicted, so your proposed reaction will be ineffective.

Trying to specify this level of detail is like designing strategy – it will probably be overruled by your team in the heat of the moment. That is a good thing, since when things fall apart, they will be making decisions based on what actually happened, rather than what you predicted might happen. So, how could standard responses look? Remembering what we know:

1. We operate in a volatile market.
2. We employ people capable of thinking for themselves.
3. Our people will make decisions they think are best, given what they know.

The best response to any problem or emergency is to get the team working together to gather data, assess the situation, and make an informed decision. Over time, your team will come to trust the dashboard more and more, understanding that it is informed by experience and represents what they believe about the future. A significant benefit is that any new team member can quickly get up to speed on what really matters in your part of the business, and start making a meaningful contribution to both performance and growth.

4. Energy
How do we inspire everyone to really show up?

Now you have a strong performance framework in place, with everyone in your team clear on what matters most, taking accountability for the outcomes required from their roles, and focusing on the most important priorities, what remains is to energise your team. While they will probably do whatever is necessary to earn their salaries, you will need to generate energy in your team if you want them to bring their best selves to work and make meaningful contributions. This is not because you owe it to them, but because you owe it yourself. **Generating energy is far more fulfilling and far more rewarding than micromanaging** a group of individuals who are checked out emotionally and dragging their feet to every status meeting. In fact, Nyati (2019: 122) described employee engagement as a source of sustainable competitive advantage.

If it is up to you as the leader to generate energy, how exactly do you do this? Here is a helpful acronym – remember that, like yourself, all your team members have 'LIVES' beyond work:

- First, **listen** to your team – beyond what they are saying, to how they are showing up, what drives them, and what this says about who they are. It is equally important to listen for what they are not saying, because the gaps provide helpful clues (Klemich and Klemich, 2020: 219). When you start to form pictures of the individuals in your team, you are ready to connect with them. This is the first step towards generating energy because, by listening to who they are, you are silently telling each team member that they matter and that you care.

- With a sense of who your team members are, you can begin to think about **inviting** them to contribute in a way that connects who they are and what the organisation needs. In this way, you invite your team members to do meaningful work that will energise them.

- The third step towards generating energy requires that you intentionally **value** employees' contributions in a way that speaks directly to each team member. All of us want to know that our contributions are really valued. So, the question is: 'How will this contribution be rewarded?' If the reward does not inspire meaningful contribution, then it remains just a salary, an expense. Ironically, the way to turn this expense into an investment is not necessarily by increasing someone's salary. The key lies in including intangible rewards.

Now, you have got your team members' attention by taking an interest in them, inviting them to make a difference, and giving them access to opportunities. This is a critical point, where the question becomes 'What will you do with that attention?'

- You need to engage your team – this is how you make it clear that you need their best contribution - rather than simply leaving them to their own devices. In engaging them, your goal is to get them out of their comfort zones, because that is where growth happens. All of us are energised when we grow, even if it may be a bit uncomfortable for a while
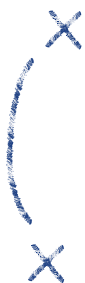
- This is why support matters. Your team needs to know that you have got their backs – not to provide the answers, or tell them what to do or even to make it acceptable, but to be there as a backup when they need support. Buckingham and Goodall (2019: 28) found that team members who trust their team leaders are 12 times more likely to be engaged at work. When your team knows you have their backs, they will go out and give it their all.

Keeping it real

If you want to implement strategy effectively in this new world of work, where working conditions and expectations have changed significantly, and continue to change, adopt the **CAFE Framework™**. Start with creating clarity about purpose (why your work matters); principles (how you make decisions); and promises (about deliverables to your key stakeholder groups). Second, inspire accountability through courage, curiosity, and acumen – transferring ownership of appropriate outcomes to your team, linked to their roles. Third, align your team's focus, agree on the key indicators, metrics, threshold values, and appropriate responses. And, most importantly, generate energy by:
- Listening to discover who is on your team;
- Inviting your team to contribute meaningfully;
- Valuing team members' contributions by investing in intangible rewards that will generate returns in the form of discretionary effort;
- Engaging your team members to step out
- Supporting them all the way, demonstrating that you have their backs.

All the very best as you develop your own playbook for generating tangible return on investment.

1.Clarity
What makes us who we are?

2.Accountability
How do we get everyone to own the outcome?

3.Focus
How do we know we are really contributing?

4.Energy
How do we inspire everyone to really show up?

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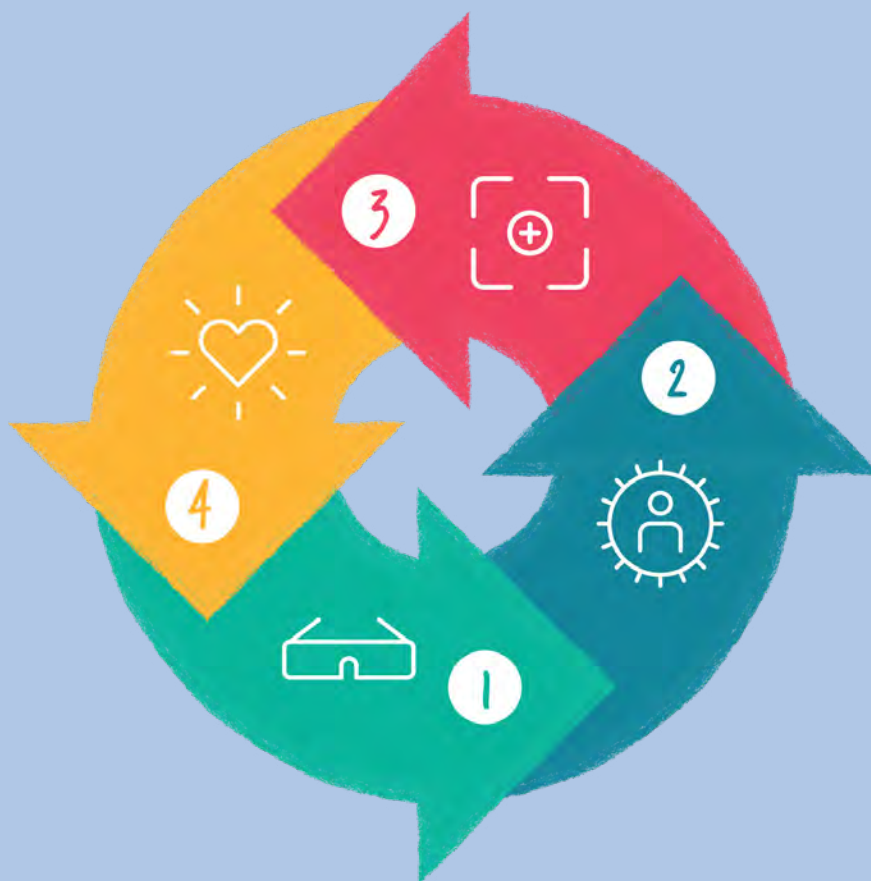
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