Open Leaders Yearbook

Transform your leadership style with these leadership lessons

Open Leaders Yearbook. Jim Hall, Blythe Williams (eds.). (2025) Coaching Buttons, supported by Hallmentum LLC.

Table of Contents

Introduction

Blythe Williams (ed.)

What is a leader to an organization? And, much more importantly for this book, what is an *Open Leader?*

The first question is relatively easy. Leaders are the driving force behind any organization. They force their organization to come together to achieve their combined goals, to the benefit of the employees and the institution itself.

The second question is much more complicated. What exactly is an *Open Leader*?

According to TheOpenOrganization.org, an open leader is someone who fosters an open organization by creating spaces where transparency, inclusivity, adaptability, collaboration, and community are valued; and by establishing connections with subordinates that enable them not only to survive but to thrive in their organizational environment.

However, being an *Open Leader* in practice is much more than creating an environment. An *Open Leader* pushes for open conversations and nurtures communication at all levels for everyone. By fostering a conversational culture, an Open Leader can ensure their subordinates feel comfortable contributing to their organization's community and goals. The open conversations an *Open Leader* creates give their employees the space to grow and the opportunities to reach beyond their defined roles.

This book is about leadership, specifically *Open Leadership,* through the perspective of several contributors to our website, *Coaching Buttons*, published between 2024 and 2025. We will explore what it means to be an effective *Open Leader.* We will discuss how to build an open organization, foster your employees' growth, improve process adaptability, and many more topics relating to open leadership.

How to Nurture Open Leaders By Letting Go

Jos Groen *is a transformational leader and coach, passionate about the open culture and open organization approach. Jos's ambition is for transformative organizations to be open organizations, and his mission is to give the organization back to its employees. Currently, Jos is helping organizations across the globe to succeed in their digital transformation journey through valuable, tailor-made solutions and innovative projects.*

Work together with established managers and emerging leaders to build open organizations. That requires respect, curiosity, and trust from all sides.

The truth is that leadership talent rarely develops on its own, and if organizations wishing to become more open want to see open leaders thrive, upper management has a specific job to do. It must create balance—not only between the organization's conventional management principles and more open ones, but also between reason and feeling, and between head and heart. In other words, this involves creating a balance between individual ego and collective needs.

These are the primary conditions for getting the entire organization moving in an open direction.

Foster an open culture

At the beginning of what I've called your organization's "hybrid phase," the "top" of the organization consists primarily of leaders and managers. To achieve a better balance, management will have to allow leaders into the boardroom as well. This is because managers tend to train more managers, not necessarily more leaders. To help their organizations become more open, current leaders need to break the pattern of allowing only people with similar skills participate in leadership activities; they need to be open to new dynamics by seeking collaboration with leaders who embody open mindsets and behaviors (if your don't allow this, conventional ways of thinking, managing, and behaving will remain intact). They must remain curious, recognizing that newer generations of leaders may be tired of simply being told what to do and instead want to be invited to contribute.

Fostering open leadership mindsets and behaviors is necessary for moving forward and completing the transition from conventional organization to open one. Open doors for talented leaders, and be open to learning from each other by respecting each other's different behaviors, mindsets, and views.

In most organizations, this kind of motivated leadership talent is already present; you just need to give it a place to add value to your organization's open transformation.

Let's examine how this might work.

Be open and respectful

First, let's discuss the role emerging leaders need to play in this process.

These leaders will have to approach seasoned and authoritative managers openly and respectfully, recognizing that these managers have acquired their current positions for a reason and have served the organization for many years. Moreover, they should recognize that these longstanding managers are opening themselves up to the transformation process, an initial step that could be somewhat nerve-wracking for them. Patience and understanding are key.

Of course, the same dynamic is necessary in reverse. Learning happens in both directions. By acting as a team, managers will gradually gain insight into (and build an understanding of) the ways of thinking and behaving that are more common in open organizations. This enables them to adapt to them gradually and become proficient in them over time. Emerging leaders shouldn't expect change to occur instantly.

If your organization has established systems for building effective connections between senior leaders and emerging leadership talent during the hybrid phase (and both are willing to learn from each other) you'll see the possibility for real change. The kind of leadership the Twenty-first Century demands of us begins with respect for traditional ways of managing—not tossing them out, but reflecting on them and building on the parts of them that truly work.

As Dee Hock, founder of Visa, once said: "The problem is never how to get new, innovative thoughts into your mind, but how to get old one's out." It's not hard to have new ideas, as they come naturally. What's harder is letting go of old ideas.

Build a flow

Now let's look at the role senior leaders will play in this balancing process.

Senior leaders and managers will need to understand that shifting and rotating leaders through various board and leadership positions in an organization—perhaps as often as every three to four years—is a healthy practice for an organization. It allows the kind of fluidity that leadership talent needs in order to emerge and make an impact on some aspect of the organization.

As a leader, you'll need to admit that this involves nurturing the talent your employees already have and then, when the time is right, stepping aside. This creates the kind of flow that encourages personal development at all layers of the organization and fosters a spirit of continuous improvement throughout.

In more traditionally run organizations, a management team determines if the time is right to move on. Unfortunately, that consideration isn't usually connected to talent, competences, or skills. So a certain dynamic tends to develop during an open organization's hybrid phase: Managers who have earned and acquired their positions are not willing to give them up so easily. That's certainly understandable, but it's not helpful if they're blocking valuable talent from moving to new positions where they can catalyze the organization's transformation to an open one.

In practice this is the hardest step for established managers to take, because they are often too deeply rooted and ingrained in the current organization. (At least that's what they think. They're really guided by a sense of fear: "If I change positions, will I still receive the same respect as I did in my old role?") Unfortunately, you rarely see this practice of rotation in place; in fact, in many organizations, people actively prevent it.

However, when moving towards openness, the balance between leaders and managers requires decisiveness, clarity, and transparency—that is, leadership. This will generate more energy for the movement towards a more open organization, and builds essential trust. When emerging leaders see senior management working with a spirit of genuine curiosity and courage, they'll likely respond with gratitude, creating a culture of mutual recognition. This positive cycle—curiosity and courage leading to respect and recognition—can help you attract more talent seeking a similar environment, creating a more diverse and inclusive organization while building your organization's capabilities.

But it's only possible if people feel they're working in an environment where they can be themselves, feel included, and trust others.

Make an impact

When managers and senior leaders have embraced a new vision for talent development and committed to becoming a more open organization, they'll have several important (and highly visible) impacts on their organizations.

To start, employees will see opportunities to develop themselves and their talents. And if they feel safe to develop—and are allowed to make mistakes in the process, to experiment and learn—they'll encourage others to follow their lead and do the same. When you've created a culture where the best ideas start winning, you'll cultivate talent that derives a sense of pride from contribution. This way, you'll contribute to the unity of the collective and increase your chances of success moving forward. If your talent feels seen, stimulated, and appreciated, then your talent will become more engaged.

At the same time, it will be clear to everyone that working together in a team stimulates both creativity and active contributions on the part of individual team members. You communicate that people in your organization are stronger together, and therefore are more open to failing and learning together. This belief creates (regardless of the context) the motivation to achieve the best outcome for the group. This is a critical mechanism in any open organization.

Of course, real life and real transitions are often more unruly than the straightforward explanations I've offered here. But the process is worthwhile. In my next article, I'll discuss employees' choice to work on transformation under the guidance of leaders. And I'll also summarize everything we've covered in the series so far, adding a few final tips for managing talent in open organizations.

Elevate Open Leaders By Getting Out Of The Way

***Jos Groen** is a transformational leader and coach, passionate about the open culture and open organization approach. Jos's ambition is for transformative organizations to be open organizations, and his mission is to give the organization back to its employees. Currently, Jos is helping organizations across the globe to succeed in their digital transformation journey through valuable, tailor-made solutions and innovative projects.*

Your open organization leaders know the most effective path forward, but are you giving them the space to get there?

Today, we're seeing the rapid rise of agile organizations capable of quickly and effectively adapting to market new ideas with large-scale impacts. These companies tend to have something in common: they have a clear core direction and young, energetic leaders—leaders who encourage their talented employees to develop their potential.

The way these organizations apply open principles to developing their internal talent—that is, how they facilitate and encourage talented employees to develop and advance in all layers of the organization—is a critical component of their sustainability and success. The organizations have achieved an important kind of "flow," through which talented employees can easily shift to the places in the organization where they can add the most value based on their talents, skills, and intrinsic motivators. Flow ensures fresh ideas and new impulses. After all, the best idea can originate anywhere in the organization—no matter where a particular employee may be located.

The elements of success

I see five crucial elements that determine the success of businesses today:

1. Talented leaders are engaged and empowered—given the space to develop, grow, and build experience under the guidance of mentors (leaders) in a safe environment. They can fail fast and learn fast.
2. Their organizations know how to quickly and decisively convert new ideas into valuable products, services, or solutions.
3. The dynamic between "top" and "bottom" managers and leaders in the organization is one of balance.
4. People are willing to let go of deeply held beliefs, processes, and behaviors. It's brave to work openly.
5. The organization has a clear core direction and strong identity based on the open principles.

All these elements of success are connected to employees' creativity and ingenuity.

An open and safe working environment

Companies that traditionally base their services, governance, and strategic execution on hierarchy and the authority embedded in their systems, processes, and management structure rarely leave room for this kind of open talent development. In these systems, good ideas too often get "stuck" in bureaucracies, and authority to lead is primarily based on tenure and seniority, not on talent. Moreover, traditionally minded board members and management don't always have an adequate eye for management talent.

So there is the first challenge! We need leaders who can have a primary eye on leadership talent. The first step to balance management and leadership at the top. Empowering the most talented and passionate—rather than the more senior—makes them uncomfortable. So leaders with potentially innovative ideas rarely get invited to participate in the "inner circle."

Fortunately, I see these organizations beginning to realize that they need to get moving before they lose their competitive edge.

They're beginning to understand that they need to provide talented employees with safe spaces for experimentation—an open and safe work environment, one in which employees can experiment with new ideas, learn from their mistakes, and find that place in the organization where they thrive.

But the truth is that there is no "right" or "wrong" choice for organizing a business. The choices an organization makes are simply the choices that determine their overall speed, strength, and agility. And more frequently, organizations are choosing open approaches to building their cultures and processes, because their talent thrives better in environments based on transparency and trust. Employees in these organizations have more perspective and are actively involved in the design and development of the organization itself. They keep their eyes and ears "open" for new ideas and approaches—so the organization benefits from empowering them.

Hybrid thinking

The transition from a conventional organization to a more open one is never a guaranteed success. During this transformation, you'll encounter periods in which traditional and open practices operate side by side, even mixed and shuffled. These are an organization's hybrid phase.

When your organization enters this hybrid phase, it needs to begin thinking about changing its approach to talent management. In addition to its individual transformation, it will need to balance the needs and perspectives of senior managers and leaders alongside other management layers, which are beginning to shift. In short, it must establish a new vision and strategy for the development of leadership talent.

The starting point here is to create a safe and stimulating environment where mentors and coaches support these future leaders in their growth. During this hybrid period, you will be searching for the balance between passion and performance in the organization—which means you'll need to let go of deeply rooted beliefs, processes, and behaviors.

In my opinion, this means focusing on the human elements present in your organization, its leadership, and its flows of talent, without losing sight of organizational performance. This "letting go" doesn't happen quickly or immediately, like pressing a button, nor is it one that you can entirely influence. But it is an exciting and comprehensive journey that you and your organization will embark on.

And that journey begins with you. Are you ready for it?

Applying An Open Decision Framework

__Jimmy Sjölund__ is an organisational transformation expert with extensive experience sparking change at large, multinational companies. He also serves as an Ambassador for the Open Organization project and community and is a maintainer of the Open Decision Framework.

The Open Decision Framework is a tool for making collective decisions in a transparent and inclusive way. It is useful for open leaders who seek to build open organizations or communities. Build steps from the Open Decision Framework into your project plan or decision-making process.

Many organizations grapple with the challenges of fostering and maintaining an open organizational culture. To assist with this work in a practical way, the Open Organization community helped create and continues to maintain this flexible, iterative framework for applying open principles to organizational decision-making processes. It's designed to help decision makers and leaders seek out diverse perspectives and collaborate across teams and geographic areas to facilitate better decisions. The Open Decision Framework began as a Red Hat project. Over time, it has grown to reflect the collective intelligence and ongoing research of the Open Organization project and community.

What is the Open Decision Framework?

It's a flexible, open approach to making decisions. While it's effective for decisions that impact the organization, using it for every decision might overcomplicate your processes. But for decisions that impact the people in the organization, community, or culture, it is particularly valuable.

The Open Decision Framework originated in 2009 within the Red Hat People team and a cross-functional focus group. It was built on research and materials from Duke University, Diana Martin, and various community resources.

The purpose was to create a method for aligning business decisions with the needs and values of the people, thereby helping to preserve our culture. This framework demonstrates best practices and offers guidance to teams and leaders on balancing transparency with confidentiality. This approach was essential both for maintaining the culture as the company grew and for onboarding new employees. There was, and still is, a long tradition of discussions in our internal communication channel, the memo-list. It's an open mailing list discussing, well, everything. This framework aimed to guide more structured discussions when needed, to improve associate engagement and sort out the signal-to-noise ratio.

In 2012, the Project Management Office adopted the framework as part of their effort to create an open project management methodology. In 2014, it spread to IT and engineering when there was a suggested move to Google Calendar. These conversations served as a catalyst for sharing drafts with all associates and inviting their participation. Using the Open Decision Framework would support and guide those discussions and lead to a more transparent and inclusive decision. As an open source company, Red Hat naturally published the framework to the community in 2016, hoping it would be valuable for other organizations or communities.

After a period of diminished use, the community version of the framework was picked up by the Open Organization community who took ownership and maintenance responsibilities of the framework in 2024.

What is an Open Decision?

At Red Hat, we have a long-standing culture of open source principles. This includes open emails and debates, such as the internal mailing list, 'memo-list', mentioned earlier. This practice of sharing information to ensure transparency and gather diverse feedback directly translates into making open decisions:

- **Transparent**: Transparency is key to building trust and ensuring informed participation. People need to be aware of existing problems and ongoing decisions, know who is responsible for making decisions, understand the requirements and constraints, and be clear on how they can contribute.

- **Inclusive**: Inclusivity is equally important. Those impacted by decisions should have a voice in the process. Actively seeking diverse perspectives ensures more comprehensive and effective outcomes.
- **Customer-centric:** Think of people involved or affected as customers with competing needs and priorities. When a decision benefits some but may disappoint others, focus on managing relationships and expectations while maintaining productivity.

Open decisions are made using open source principles

We use open source principles to make open decisions. These principles include:

- **Open exchange:** Whether you're developing software or trying to solve a business problem, open exchange begins when you share your "source code" with others. A free exchange of ideas is critical to creating an environment where people are empowered to learn and use existing information toward creating new ideas.
- **Participation:** When we are free to collaborate, we create. We can solve problems that no one person may be able to solve on their own. Those most impacted by the change can help influence it by identifying misconceptions, filling data gaps, and course correcting as needed.
- **Release early and often:** As with our software development practices, we want to release early and often to get crucial feedback. Rapid prototypes can lead to rapid failures, which are valuable learning opportunities that accelerate the development of better solutions. When experimentation is encouraged, you can look at problems in new ways and look for answers in new places. You can learn by doing.
- **Community:** Communities are formed around a common purpose. Communities bring together diverse ideas and share the work, allowing us to create beyond the capabilities of any one individual. By multiplying efforts, we can achieve more together than we could alone. As the proverb goes, "If you want to go fast, go alone. If you want to go far, go together." Forming communities around the decision-making process builds trust in the process itself, regardless of the final outcome.

Open source principles lead to better decisions

Open source principles not only lead to better decisions but also result in better outcomes. The process also fosters buy-in for the decision. Making an open decision might take longer than a top-down approach. However, it will result in much stronger and faster adoption, making subsequent steps easier and quicker. In open source communities, when decisions are made without community agreement, we've seen members spin off to a new project or simply walk away.

Open decisions lead to outcomes that can be implemented, realized, and acted upon more quickly because people are already aligned. The strength of this approach lies in the evolution of the best ideas. This means you are not restricted by predetermined notions. While you might have a general direction, the openness of the process allows for innovative ideas that might not have been considered otherwise. The diverse perspectives within the group bring fresh ideas that you might not have anticipated.

Higher associate engagement helps to identify potential issues or unanticipated impacts early on, ensuring that decisions are aligned with both strategy and culture.

You can't please everyone

But when open decisions are made, people can say:

- "I understand why the decision was made and how it aligns to our strategy, goals, and mission."
- "There was visibility to the business requirements, research, and evaluation criteria."
- "The decision-making process was inclusive and transparent."
- "Although I wasn't the decision maker, I was able to contribute to the process."
- "I may not agree with the decision, but it's obvious that the decision makers understand our values and culture."
- "I might be disappointed, but I wasn't surprised."
- "My voice was heard and valued."

You will never get a perfect decision that 100% of people agree with, but everyone has a chance to feel heard. They gain an understanding of why the decision had to be made, as well as insight into the requirements, constraints, research approach, and evaluation criteria. They have the opportunity to challenge, discuss, and contribute to the decision-making process. This understanding helps people accept the decision, the next steps, and participate—even if they don't agree with every aspect.

The four phases of the Open Decision Framework

The Open Decision Framework consists of four phases, which do not necessarily follow a linear progression. The phases may overlap or need to be revisited, depending on the decision-making process and the lessons learned along the way:

1. Concept, Define, Ideate

- Lead with transparency.
- Define a Problem Statement.
- Identify who will contribute and who will sign off.
- Build diversity of thought and an inclusive environment.

This phase involves defining the problem statement in clear, concise language to ensure we address the right problem and stay focused. Make sure to revisit the problem statement throughout the process to maintain clarity. It's important to carefully scope the decision, as not all aspects may be open. For example, financial constraints might limit our ability to hire external resources, so we must work within the available people and resources. Constraints might also dictate viable approaches, such as regulatory requirements that mandate certain procedures. Such constraints need to be well communicated to maintain openness and avoid misunderstandings.

The next step is to identify who will contribute to the decision and who will ultimately be responsible for it. For example, the CFO might be responsible for releasing funds, or the CEO sets the strategic direction, but again, these are clearly articulated, have clear boundaries, and ensure that any rejections can be explained, maintaining transparency.

2. Plan, Research

- Gather input.
- Make it easy to participate.

- Explain the obvious and publish your research.
- Remain open to new information and perspectives.

In this phase, we conduct research, engage with the organization, and gather both qualitative and quantitative data to collect as much relevant information as possible. A key aspect of this phase is reducing barriers to participation. For example, avoid scheduling calls at times that are inconvenient for participants in different time zones.

In an open source community, challenges like language barriers must be addressed. Consider strategies to make it easier for non-native English speakers to participate and ensure their voices are heard. Also, consider different ways of communicating. While some people might find it easier to talk and discuss, others might need time to reflect and choose to respond in writing. Don't limit participation to a single format.

Clearly define the type of feedback you are seeking, and consider peer-to-peer communication options in addition to formal channels. Plan the transition, gather feedback, and think through how you will respond to those who may be unhappy with the chosen direction.

3. Design, Develop, Test

- Build your community.
- Promote open exchange.
- Make it safe to voice concerns.
- Publish progress in an open place.

As we move from the previous phase into Design, Develop, and Test, we have formed our hypothesis and potential decisions. Now, we focus on building a community around these ideas. Ensure that people have opportunities to provide feedback through the appropriate channels, and make sure to evaluate and acknowledge it. A simple acknowledgment like "Thank you for your feedback! We really appreciate your input." goes a long way in making people feel heard. When a suggestion isn't feasible, explain why. If a suggestion is implemented, highlight the change and credit the person who contributed. This approach demonstrates the incremental evolution of the decision.

As an exercise, pretend it's launch day, and people are surprised or upset. What could have triggered this reaction? Identify any changes or clarifications that could prevent this reaction, and address them proactively. Engage your ambassadors and equip the community with the tools they need to address misinformation and misunderstandings.

4. Launch, Deploy, Close

- Begin with the end in mind.
- Show how feedback shaped the decision.
- Default to open.
- Contribute upstream.

Finally, it’s time to launch. Ensure that the decision aligns with your strategy, culture, mission, and values. Clearly demonstrate how feedback influenced the decision and explain how people can continue to provide input after the launch. Acknowledge any gaps or concerns, we’re human, there are going to be gaps. There may be fears and concerns, and as we discover them, it’s important to address them openly. This might require a follow-up or even a separate Open Decision Framework (ODF) process. It’s important to acknowledge when you’re not fully satisfied with the decision, or when you know that others may not be. Stay engaged with those who disagree and continue the dialogue.

These four phases function as feedback loops rather than following a strict waterfall approach. As new information arises, we may need to revisit earlier phases to adjust our approach. We typically timebox the phases to maintain momentum and ensure progress.

What Is Adaptive Leadership?

***Ron McFarland** has been working in Japan for over 40 years, and he's spent more than 30 of them in international sales, sales management training, and expanding sales worldwide. He's worked in or been to more than 80 countries.*

When organizational challenges don't have clear and immediate solutions, open leaders need to think differently about their roles.

Adaptability is a key principle in open organizations. Open organizations remain flexible in the face of rapidly changing environmental conditions, especially by implementing systems for monitoring and responding to feedback loops while addressing complex issues.

Yet the Open Organization Definition says relatively little about the way adaptability functions as a core value of open leadership. In this article, I'll explain how open leaders can embrace adaptability, and how it can enhance their leadership abilities while at the same time leading to more effective decision-making.

Three leadership considerations

In open organizations, "leaders" need not necessarily be "managers." Leaders can arise anywhere, and leadership is an ability anyone can enact.

But under what conditions should a leader choose to lead? And how should that leader choose to lead?

Consider these three issues when determining the best method of leadership in an open organization:

1. The problem or opportunity

Leadership emerges as a response to a problem. Is there a problem that must be addressed? If so, what is it? Can we just ignore it, thinking it will solve itself over time?

Let's say you are part of top management in a company that's losing sales rapidly. One opinion regarding this trend toward loss of sales is that it's "just cyclical," that sales will come back without us having to change our current activities. Perhaps no new vision or leadership is necessary. Another opinion might be that something must be done differently, and someone should take the responsibility to execute it.

First of all, everyone must agree that something must be done. The issue next is identifying the exact nature of the problem.

Returning to our example above: Is a decline in sales the result of a competitive threat, a product quality issue, a production defect, a decline in customer demand, or something else entirely? That must be clarified and detailed before a solution can be selected. Does someone have the experience, reputation, knowledge, and skills to see the problem at the necessary level of detail?

This same process of identification applies to business opportunities as well as business problems. Is there a business opportunity that we just can't ignore?

2. The solution

If the problem has been clarified and detailed, and we know that some action must be taken, the next question is this: Do we have someone who is willing and able to select the best solution? Many strategies are possible, but which one is best?

Returning once more to the example above: Which solution is best to get sales growth back on track? Does anyone in the organization have the necessary experience and expertise in selecting ideal sales strategies?

3. Execution

Let's say we know what the best solution is. Our next question will be this: Do we possess the skills and resources to implement or execute that best solution (or know where to get them)?

When determining the ideal management style, consider those three issues. First, is there a detailed problem that must be addressed or a detailed opportunity that must be explored? If not, we can stop right here. If yes, we must explore it further. Assuming there is a problem that must be addressed, is there a clearly defined solution, or does someone know exactly what the solution is? And finally, are the resources, skills, procedures, and reputations available for efficiently executing on the decided solution?

If those traits are available (or can easily be found), then the organization is facing a "technical challenge" as described by Ronald Heifetz, Alexander Grashow, and Marty Linsky in their 2009 book, The Practice of Adaptive Leadership. Technical challenges, the authors argue, can easily be handled through conventional, "top-down" management styles engaging the most appropriate, knowledgeable people.

Unfortunately, in more and more cases today, problems are not obviously or clearly defined. The selection of the solution is not so easy. And the implementation of that selected solution does not follow a clear process with discrete steps, procedures, and guidelines.

Thinking adaptively

So how should leaders act differently in the face of a more ambiguous challenge?

If problems, solutions, and execution methods are not immediately understood, then the organization faces what the authors of The Practice of Adaptive Leadership call an "adaptive challenge." And this kind of challenge requires an "adaptive leadership" style.

The research these authors have done has led them to the same conclusions that the open organization community has reached: Open organizations, with a bottom-up management style, require a certain type of leadership, similar to "adaptive leadership" the authors define. Over and above my personal experience, I found the research in this book helpful for understanding how adaptability might apply to leadership practices.

Before the authors explain "adaptive leadership," they introduce the situations in which it's best applied. Let me explain in more detail what I mentioned above. Consider three kinds of challenges: "technical challenges," "technical and adaptive challenges," and fully "adaptive challenges."

Technical challenges: As I've already mentioned above: These challenges are clearly defined, and leaders know in precise detail what the problems are. On top of that, they know exactly what to do to find a solution to the challenge and how to execute that solution. In this case, a top-down management style would be a fine way to address these challenges.

Technical and adaptive challenges: With these challenges, there is a clear understanding of the issue, but learning is required to reach an ideal solution. Some top-down authority would be helpful for tackling them, but front-line stakeholders (people affected by the challenge and in need of a solution) must be involved to explore what the ideal solution could be and how to execute it.

Adaptive challenges: These challenges are more complex. There's a vague knowledge of the challenge that must be addressed, but there is no expertise to clarify it. Learning is required just for identifying and clarifying the exact nature and magnitude of the challenge. Once it's identified, even further learning is required to come up with the ideal solution. And lastly, once the best solution is determined, then procedures, resources, and skills must be introduced to execute that solution. Front-line stakeholders must address these challenges. And within that group of stakeholders, one person must take the lead and facilitate the process. The authors call this leader the "adaptive leader." (Figure 1, below, summarizes these challenges and potential leadership responses.)

With authority

Leadership effectiveness hinges on authority, something that leaders who emerge spontaneously in response to a problem might not always "officially" have. The Practice of Adaptive Leadership defines several types of leaders, namely leaders with "formal authority" and/or "informal authority," and people that are "adaptive leaders" and/or "stakeholders." The authors note important considerations regarding all of them.

Formal authority: People with formal authority can officially ask others to do something; they're in a position to influence a proposal to solve an adaptive challenge. People with a great deal of formal authority could possibly have little informal authority. They may have the ability to stop a viable project or even start a non-viable project. Simply, they may have little ability to address the adaptive challenge and execute on it.

Informal authority: People with informal authority are experts on specific issues. This is what some individuals unofficially bestow upon or expect of a person because of his or her reputation, trustworthiness, experience, skills, and expertise. On specific issues, people with informal authority possess high degrees of respect, skill, and expertise among all stakeholders and others (particularly regarding adaptive challenges). These individuals can unofficially influence opinions. They can help to turn "adaptive" challenges into "technical" challenges (as defined above).

Adaptive leaders, then, facilitate possibly many people with informal authority in decision-making, learning, and execution on issues for which there is no single specialist or expert on which all people can totally rely. These leaders may or may not have formal authority, but having formal authority would be helpful to them. "Stakeholders," on the other hand, are the key group of representatives or individuals participating in solving an adaptive challenge. They are directly impacted by it and want to do something about it. They're the front-line, trial-and-error-oriented people who generate the most learning about problems the organization faces. Directly or indirectly, these stakeholders have strong incentives to address the adaptive challenge. People with formal authority in the organization should encourage them to address this adaptive challenge.

Kind of Challenge	**Problem Definition**	**Final Ideal Solution & Execution**	**Central Positions to Address Challenge**
Technical with full expertise available	Clearly defined and know the problem	Clearly defined and know how to execute solution	Formal authority or specialist on problem
Technical and adaptive (total expertise not available to solve challenge)	Clearly defined and know the problem	Requires learning in finding the solution and executing that solution	Formal authority, some informal authority and stakeholders
Adaptive challenges with no expertise on the issue, exploration required	Requires learning to identify and clarify the problem	Requires learning in finding the solution and executing that solution	All stakeholders (with something to gain or lose), include one adaptive leader

Table: Organizational challenges and leadership responses. Courtesy of Ron McFarland (CC BY-SA) and modified from The Practice of Adaptive Leadership by Ronald Heifetz, Alexander Grashow, and Marty Linsky, p. 20.

Leadership without formal authority

Some degree of leadership is required for addressing any organizational challenge, even ones for which there is no clearly visible, organizational “formal authority.” Adaptive leadership is required for front-line, adaptive challenges. Anyone who takes on this “adaptive leadership” role will need to address these “adaptive challenges” using skills the open organization community has chronicled.

If an open organization applied adaptive leadership techniques, it could turn “adaptive challenges” into “technical challenges,” creating an organization that is continually developing and strengthening.

The Benefits Of Fractional Leadership

Laura Hilliger *is a writer, educator and technologist. She's a multimedia designer and developer, a technical liaison, a project manager, a conceptual architect, an open advocate who is happiest in collaborative environments. She's a co-founder of We Are Open Co-op, an Ambassador for Open Organizations, is helping to open up Greenpeace, and a Mozilla alum.*

After years of working with and for a variety of different kinds of social impact organizations—from educational institutions to cooperative federations, small community-based charities to global non-profits—we've been lucky to see how our strategy and "critical friend" services can help leaders set foundations for an organizational programme or initiative.

It's only lately that we've thought about some of what we do through the lens of "Fractional Leadership." We are experts in cooperation, learning, technology and community, which means the type of leadership that we bring into projects is quite specifically Open.

What is Fractional Leadership?

Fractional leadership is essentially outsourcing a role or a part of a role to an expert who can help you hit the ground running. Such positions are great when you know you need a new department (e.g. Digital Transformation) or if you're kicking off a new project that needs someone to lead. They're also helpful when you know you want to hire someone full-time, but want to find the right person for your organization.

Fractional leadership provides you and your organization with some flexibility because it gives you the time and space to make the right decisions in staffing and for your organization as a whole. It's potentially less expensive than hiring someone full time and can be explicitly bound in a statement of work. It's also a way to test whether or not a particular new position makes sense to your organization.

It is a way to work with diverse experts who have wide-ranging experience that you would like to apply to your organization as it grows, changes and transitions.

The shadow side of fractional leadership

As with any concept we pull from the world of business into the social impact space, we need to be aware of how it can manifest inside an organization that isn't only trying to maximize profits.

Often, organizations in our space are unaware that what they need is a leader and look to us to create a specific "thing". "We just need a digital strategy," or "We just need a training programme," are things that often come up in projects that obviously need something more. Working openly and helping people to understand how technology and funding intermingle, how community drives participation, how recognition motivates or how a learning programme can scale all require leadership.

Often funding in the social impact space is to develop a specific thing, not the impact that thing should have. Complex realities also mean that someone who might be a leader in one context might not have what it takes to lead in your context. This is why an open leader is so important. Fractional leadership in the open is a rare thing indeed.

A fractional leader needs to be adaptable and find ways to stay within the bounds the organization has, while also setting a project or department up for future impact.

Preparing for a new colleague

Still, experienced fractional leaders are well versed in making do with what they're given. They can lay out plans and programmes with the future in mind. The strategies and processes put in place during a time of transition reflect a moment in time. Setting them up as iterative and designing them to evolve empowers future leaders.

We've offered "critical friend" services to help onboard the people who will take over from what we were asked to start. We've advised on workload and priority based on community engagement in tandem with organizational goals. We like to do the work of documenting and establishing open, productive processes and policies to help future collaborators take over when the time comes.

Is Fractional Leadership for you?

Your fractional leader can start:

- Developing a strategy that focuses on long term social impact
- Creating processes or frameworks to measure impact or create processes for gathering data and insights
- Building assets to begin implementing the change needed to achieve the impact you're looking for
- Supporting and working with others on your team to co-design principles and approaches that support your mission
- Determining the skills and competencies necessary to lead the project, programme or department they're working within and helping your organization find someone to take over

The whole point is that you can bring in engaged experts to help you get something going while looking for your forever person. There are lots of people working in the social impact space who have deep expertise in everything from finance to HR to product development and design.

Fractional leadership is something you can simply try out. As you create briefs or write out job descriptions, just ask yourself, "Would a designated fractional leader give me more time and space to ensure this is a long-term success?"

What The Pandemic Taught Us About Virtualizing Our Organization

Daniela Arellano *is the Deputy Manager of Administration and Finance at TECO Group in Chile.* ***Chris Hermansen*** *is a Founding Partner at TECO Group in Chile.*

Our company provides community relationship consulting services for a wide range of businesses in Chile, from Arica in the north to Punta Arenas in the south, in the mining, forestry, energy generation and transmission, retail, wholesale, distribution and other sectors. We help our clients build strong and lasting relationships with their neighbors, through the mutual reduction of risks and creation of shared benefits.

Over the course of 20 years, we have assisted more than 100 companies develop more than 500 projects that respond to the needs of the locale while meeting the goals of the investors and society at large. This has been challenging and rewarding; we have had ups and downs, and some of those downs have been very difficult to surpass; nevertheless, it's safe to say that every challenge has brought its teaching moments, and the recent pandemic is no exception.

Moving to virtual

Chile's response to the onset of the pandemic was rapid and forceful. Chileans had their first round of vaccination earlier than the USA and Canada and lockdown was at some moments much more serious than in North America. During these lockdown periods, our firm had to learn how to continue providing our consulting services in a virtual manner, since travel - even local travel - for any but the most dire emergency was completely prohibited. Online video meetings became the new norm, as elsewhere. Offices sat empty for months. Many of our staff enjoyed the ability to work from home, but for some, particularly with young children, the work day was challenging.

During this "forced virtual operation" period, we saw our relationships with our clients changing as well. Meetings had a more relaxed atmosphere; we found ourselves “in” our clients’ homes, and they in ours. Attendees seemed (mostly) less stressed, since there were no rushed trips from one office to another, and the time gained by not having to race from one event to the next created more time to prepare and more opportunities to converse.

Adjusting to online

One strange barrier appeared that needed some attention: most meeting software suggests an hour by default, and so most meetings at first seemed to be booked for an hour, even if only ten minutes was required. Gradually, as we became familiar with this new reality, we began to book shorter and more precise meetings, and found ourselves resolving urgent issues as soon as they were identified.

Given that our people, and our projects, are located all over the country, we also found ourselves better able to spend meaningful time with all staff, and our staff better able to spend meaningful time with both clients and their stakeholders. At the same time, since travel was highly restricted, our travel expenditures dropped to zero - both the time needed for travel and the direct transportation costs.

Were we missing things that physical presence would have uncovered? Of course; but so were our clients, and so were their stakeholders. In a way, we had the perfect opportunity to prototype a new working culture based on a set of tools that we had used casually and poorly (at best) in the past. No more three hour meetings with 20 people jammed into an eight person boardroom and three more “attending” by cell phone. Of course we missed the lovely Chilean pre-meeting ceremony of coffee and mineral water and cookies. But as a prelude to a three hour meeting? Where key personnel were attending voice-only on a terrible phone connection in a noisy and overcrowded space? Not so much.

Lessons learned

Fast-forward to the current moment, and many of the lessons we learned during those prototyping sessions have turned out to be useful as we come back to a mixed-mode and highly distributed business culture. In no particular order, here are some lessons we have learned:

1. **In-person meetings are time-consuming to organize,** expensive in terms of travel and accommodation, and because of that, “bulky” with attendees that only

need to be there for part of the meeting because it was so difficult to otherwise get everyone together.

2. **In contrast, virtual meetings are the very essence of agile.** Learn to make it short, focused, inviting only the necessary people, having a tight agenda; in principle, virtual meetings provide the opportunity to adopt some of that Agile methodology to build a new meeting culture. Virtual meetings are much better focused on the objective of the meeting, and with a bit of luck can wrap up in agreements on how to proceed, rather than just fizzle out into a bunch of other points that someone will study for a followup meeting.

3. **Think about how staff respond to the more-virtual culture.** Consider how to measure their reactions to it, what they see as weaknesses and strengths; how their physical and mental health changes; how working relationships in the company change. We have had to devise new and innovative ways to continue building relationships among ourselves as we maintain company culture though we are meeting in person much less. This includes creating a mechanism to help substitute for some of those "sidebars" that occur when everyone gets together in person and are often where real value is traditionally materialized.

4. **Create a regular all-hands virtual interactive meeting schedule.** For large organizations this is challenging to impossible, but maybe achievable and desirable at the level of sub-organizational units. In order to be successful, these virtual meetings require careful attention to what is important or significant for the team members, so as to avoid workshopping and empty dynamics that don't connect people together.

5. **Use the all-hands virtual interactive meetings to build a virtual-forward culture.** We found these guidelines work well:

    - Same time every week, during work hours.
    - All staff required to attend unless on leave, on vacation or dealing with an unavoidable situation with clients.
    - Create a committee to plan the meetings.
    - Develop an etiquette and lead by example. For example, sometimes attendees have a poor-quality connection, so they apologize for being audio-only; or

hands are raised, rather than jumping onto a conversation, side conversations or talking over others; always acknowledge what others have contributed; respect the diversity of opinions; strive to include all attendees in the conversation; monitor what works in each meeting in order to guide decisions for structure and content of subsequent meetings.

- Introduce topics that are by definition of interest to the group but not operational. For example, tell us about where you live or where you are working, invite external presentations on topics such as promoting mental health, upcoming regulatory changes that relate to company activities, overviews of interesting and relevant methodologies and technologies, client "visits," and so on.
- Make the sessions interactive and compliment contributors.
- Use various facilitation tricks judiciously, such as brainstorming, so as to avoid turning the meetings into a game show.
- Record (either directly in the technology or by taking minutes) conversations for subsequent review.
- Observe the "reality" of the group. There are many ideas and tools proposed for establishing group dynamics on the web, in articles and human resource journals, but to a large degree, the contribution characteristics of the members of the group drive what is possible and what works in order to create effective relationships and strengthen organizational culture.

6. Think of ways to make the built culture spill over into business / operational meetings, whether virtual or in-person.
7. Create a much-less-regular schedule of all-hands (or small group) in person meetings. In these meetings, don't allow the geographic distribution of people to limit their attendance. Also, schedule well in advance so all can attend. Differentiate strongly between the purpose of the in person and virtual meetings. Include unstructured social time, and provide one or at most two structured interactive sessions per day. Finally, document outcomes and use them to help drive upcoming virtual sessions.

Working through challenges

Of course, challenges arise out of this virtual culture, and many of those are something new in our society. Of course, we need to respond to these challenges effectively and rapidly, without a comfortable space for careful planning. Nevertheless, we should consider several characteristics and values that will make us more effective and efficient in our management of this virtual culture, whether directly for work purposes or for building that culture:

- Always be creative; not all solutions have been found, especially in relation to virtual work.
- Always maintain focus on the objectives; the "how" can be figured out afterward.
- With respect to the difficulties that will arise, always listen carefully first; then organize and look for solutions together.
- Always work on building the adaptive capacity of personnel, both on the basis of their work and the way they carry it out.
- Always consider different "key internal people" who can be relied on to help resolve difficult problems, share perspectives and drive toward "collective intelligence"; they will be your allies in solving complicated problems.

We understand that not everyone's business can be made virtual-forward; we also understand that many organizations have come up with any number of (often specious) arguments about why they must return to the office. In our case, our experience tells us that we are a much better organization, both from the perspective of staff and management, as we have become virtual-forward.

Community Management As A Service

This interview was conducted by a Coaching Buttons editor with **Jason Hibbets**, the owner of Soul Surfer Consulting.

Every entrepreneur starts by turning a passion into a mission statement. Successful entrepreneurs leverage their knowledge and experience into a service that they can provide to organizations.

We recently interviewed one entrepreneur who has done just that. Jason Hibbets is the owner of Soul Surfer Consulting, where he uses his marketing and community experience "at the intersection of open source communities and marketing." We asked Jason about the role of the community manager and how he helps organizations in this space.

Let's start with an introduction. Who are you, and what do you do?

Hello, I'm Jason Hibbets, owner at Soul Surfer Consulting and managing editor for the We Love Open Source education hub by All Things Open. My company, Soul Surfer Consulting, focuses on marketing and events consulting. More specifically, I specialize in content marketing, user-generated content, and community management. My ideal client is someone working on cool and interesting things, looking for project-based work that taps into my expertise.

When I started the company, I wasn't quite sure where the opportunities might land me, so I kept my service descriptions more broad, until I had a better understanding of what would resonate with clients. In retrospect, this was the right approach for me. It just took time to talk to folks in my network and get a better understanding of what type of work people needed help with and what the demand was for my service offerings.

How and why did you start Soul Surfer Consulting?

I started my business out of necessity. I landed a one-year contract with a client and wanted to get an LLC set up to help separate and protect my personal assets from the business. The State of North Carolina makes it very easy to set up and start a business. I actually ran my own web design company in the early 2000's, so I just had a dust a few cobwebs off.

I gained 20 years of marketing and community experience with my time at Red Hat. The universe decided it was time for me to share this mountain of knowledge at the intersection of open source communities and marketing with others, and Soul Surfer Consulting was born in January of 2024.

The other important component to all of this is that I had a life changing epiphany about how I want to spend my time and "retirement." I decided that I wanted to be in control of how I spend my time, and having my own business was an ideal solution to readjusting my trajectory to earlier retirement. If you're familiar with the movement Financial Independence Retire Early (FIRE), I am all about this!

Part of the "content marketing" at Soul Surfer draws on your background in technical writing and technical editing. What was your job as a technical writer and editor?

At a very high level, the role of a technical writer and editor is to accurately prepare technical content for readers. More specifically, I work on technical blog posts, tutorials, and video interviews. Having a background in programming and open source is helpful when editing, because I either understand what the author is describing or know when to ask questions or get clarification.

Running a technology-focused blog that involves open source and community-generated content, complicates what a typical day might look like. If I were working on product documentation with an engineering team, a technical writers day might be more standard. However, running a blog is more like working in organized chaos. The community keeps things dynamic, but the editorial calendar and Kanban boards help to keep us organized.

I sort of live in the future, because the average week for me involves looking to the weeks and months ahead. I'm planning, reviewing, editing, and entering content that won't be published for a week or two, sometimes longer. Once content is prepared, this involves blog posts, podcast interviews, and video shorts, it gets a final review before its scheduled to publish. Once the week ahead is scheduled and ready, I share the editorial calendar with the rest of the team for social media, newsletters, etc.

You also work in community management. What is the community manager role?

The role of community manager can vary widely depending on the individual, the organization, and the desired outcomes. You might be familiar with other similar job titles such as Developer Advocate, Developer Evangelist, or Technical Evangelist. As I progressed through my career, I started as a community manager. My role was to "go get great content" and build relationships for our open source community.

For me, this involved many of the technical editing skills previously mentioned. But it also involved activities such as attending technical conferences and meet-ups, delivering presentations, and most importantly, elevating the work from our community and being a big megaphone for them.

The community manager role also came with tasks like updating our executive sponsors on what we were doing, how we were planning to measure success, and sharing our community wins. It also involved being an internal advocate for the project and sharing ways that people could get involved and spread the word.

As my role changed into a Community Architect and eventually Community Director, I saw more project-based, administrivia, and managerial-type work. I was designing community programs, creating structured ways for community members to join, and advance their involvement. We needed to track all of these activities, create reports, and communicate our progress to management. I also started mentoring other community managers on my team.

Community management still feels like an elusive role that typical "management" doesn't understand. Hopefully, this gives you some insights into what type of activities community managers might be tasked with in their role.

You helped establish We Love Open Source. Tell us about that experience.

Let me share the story about the We Love Open Source educational hub and how it started. I was approached by the All Things Open team, the folks that run an amazing technology conference in Raleigh, NC attracting more than 5,000 attendees in addition to standing-room only monthly meet-ups. They wanted to grow the community and find ways to keep the momentum from the October conference going all year long. They just needed someone with experience to execute and accelerate the project.

That's when I joined the All Things Open team in early 2024 and started helping launch the We Love Open Source educational hub. The design and web team were working hard to get everything prepared on the WordPress site. This included front end design work and back end workflows, while I was getting content and inviting a few folks to be early adopters and contributors.

The reason we were doing all this work was the reason I joined the team. The All Things Open community had been asking for this for years, a place to share their knowledge with the community and conference attendees. The timing was right and we slowly started publishing community-generated content in April 2024.

Fast-forward about nine months later, we are consistently publishing content five days a week, adding new contributors each month, and we captured almost 40 interviews in the We Love Open Source studio in October. Our most popular content is getting thousands of page views and we started a new email newsletter late 2024 just dedicated to We Love Open Source podcast interviews, tutorials, and articles. Check out the Fist Bump Friday and get subscribed if you haven't already.

And the most important take-away from this is that we accept contributions from the community. The entire blog would not be possible without our amazing network of authors and world-class speakers, who graciously share their knowledge, leadership, and experiences.

Leading With Innovation

This interview was conducted by a Coaching Buttons editor with **Malanie Barham**, the CEO of Vets: Stay, Go, Diversify and Community Veterinary Outreach.

Successful leaders are reflective and intentional about how they prepare their organizations for the future. Great leadership provides inspiration to others on the team, and strong leaders develop others to step into a future leadership role.

Every leader brings a different perspective, and applies their own leadership style. I interviewed Melanie Barham, CEO of Vets: Stay, Go, Diversify, about what it means to be a leader.

Let's start with an introduction. Who are you, and what do you do?

I'm located in Canada, although my roles are international and national. I am the CEO of Vets: Stay, Go, Diversify (VSGD), a community based organization that supports veterinary careers. We provide career coaching, courses, events, conferences, and recruiting globally. Our audience is about 30,000 veterinary professionals.

I am also the acting CEO for Community Veterinary Outreach, a charity that provides pro-bono veterinary and human health care to homeless people and their pets.

What was your journey in leadership?

I have always enjoyed listening to issues, teaching, and designing solutions in a group - so while it doesn't always seem like my path makes sense, when you know this about me, it does!

I was an equine (horse) vet for high performance horses, and I loved figuring out their complex problems and getting to a sound, happy horse that could compete, and upholding horse welfare. After I had a child, I did a career pivot and joined the

University of Guelph to work on an innovative surveillance program. While at the university, I got to take on a wide variety of roles like designing and teaching a course, doing an MBA and a project management designation (PMP), leading projects, leading national organizations, conference organization, and speaking.

I also started a blog that became a business, because I saw there was a disconnect between clinical practice, and all the amazing roles veterinary professionals could lead. During the pandemic, my blog became a business, and together with others, put on the first large scale conference online in the vet industry. We had over 1,300 vet professionals attending from over thirty countries, and our programming spanned five days and twenty hours of the day.

In 2021, I was offered the position of Executive Director at Animal Health Canada, a national not-for-profit that partners government and industry together for animal health initiatives. During that time, I was quite busy - as you can imagine! My business ended up taking a bit of a back seat, and I looked for a collaborator. That led to a buyout, and I ended up going over to VSGD as the CEO. At the same time, I was offered a one-day-a-week role with Community Vet Outreach (CVO), which really fills my bucket on the charitable and giving side.

How do you define your role in leadership?

I think with both VSGD and CVO, because they are small but busy organizations that are scaling, I do quite a lot of the "doing." However, it is absolutely my responsibility to lead and ensure we are headed in the right direction strategically.

My role at both organizations is never to micromanage, but to provide our team with the tools, handrails, and details they need to succeed, and then let those smart people get on with their jobs. I am amazed at the incredible solutions my teams come up with that are far better than I could have dreamed of when I take this approach.

It's important also for me to be a cheerleader, and celebrate the wins we have, with a team of highly intelligent people who value detail and quality. Of course, feedback is in the mix, but zooming out to see the overall trend lines is key, and ensuring we are maintaining a positive culture.

I am continually learning and evolving, though, and I don't get it right every day. So for me, it's also about reflecting, listening to feedback, and modifying my approach.

Leadership also means coaching future leaders. What qualities do you look for in future leaders?

I look for innovators, people who are self-reflective, and willing to suggest new ideas. I think one quality that is critical in leadership is emotional intelligence, and it's something I work on actively - and often get wrong, to be able to try again.

What advice would you give to folks who want to step into a leadership role?

I would suggest to anyone interested in progressing in their career to follow their curiosity. Take on different and new projects wherever possible and stretch yourself. I am now over 40, so I'm probably a dinosaur in high tech land. However, I think one way I was able to leverage into different spaces easily is because of the breadth of experience I had in different arenas, leading different projects. I had led and experienced leading through adversity in a wide variety of experiences.

Doing different things also gives you a lot of data about what you enjoy and what you don't, what kinds of organizations you thrive with and which you'd rather avoid!

How do you balance your time between Hands-on, Interpersonal, Strategic, and Financial?

This is an interesting question, and I don't think that there's always a binary, strict answer on this day by day, or week by week. It's sort of like work/life balance - it's more like work/life integration.

For me, it has been helpful to have time blocks for deep work and tackling my day-to-day work, and also time to get creative and strategize. I get great ideas doing manual labor like mucking horse stalls on our farm, or walking my dog.

And for Financial, it's important to develop a regular business cycle - otherwise, things tend to fall off the radar.

How do you see the landscape changing in your industry, and how do you address those challenges?

The veterinary industry has evolved in the past few years in a massive way, especially with COVID. We've seen expansion of telehealth, flexible working, flipping from an employer's market to an employee's market - the list goes on and on. I imagine (and hope) that vet med evolves rapidly and continues to change to meet the needs of a new pet and animal owning public, and the workers within it.

Equity and inclusion, and building an industry that works well for parents, women, and under-represented groups is critical. VSGD is always "horizon scanning" and it's part of our business model to do social listening.

We only develop products that our community asks for and wants. We also try to create products that push the needle forward. For example, all of our job ads require a salary bracket on them - we were the first globally in vet med to do this. It's important for equity, it's what our community asked for, and it also increases applicants to jobs - that's win-win-win.

I hope that we can continue to do our part to push forward with modernizing the vet industry.

Communicating Across Cultures

This interview was conducted by a Coaching Buttons editor with **Ron McFarland**, a business consultant for international sales and management.

Today's leaders need an international lens, and an ability to communicate effectively across cultures and languages.

Ron McFarland has been working in Japan for over 40 years, and he's spent most of that time in international sales, providing sales management training, and expanding sales worldwide. I asked Ron about communicating effectively in an international setting.

You have a long history in international management. How long have you worked internationally?

I'm an American that has lived well over half my life in Japan, 44 years as of next March (2024).

In California, I studied business and became interested in international business (graduated in 1972). With the trade between Japan and California, I started studying Japanese. That led me to Japan in 1976. In my first year in Japan, I taught English to business people. A year later, I attended graduate school in international business.

I graduated in 1980 and soon started working for Isuzu Motors. Over many of the 21 years in that company, I gave vehicle sales seminars mostly in Africa, the Middle East, Latin America, Southeast Asia, South Asia and some European countries.

I left Isuzu in 2021 and joined Unika Company Limited. My job was to develop overseas sales markets by presenting at exhibitions. I established distributors mostly in Europe and throughout the United States through those exhibitions.

I retired from Unika in 2018. Currently, I write articles for The Open Organization, give presentations on my travels and give speeches on global business development.

I have worked internationally all those years in Japan and to this day.

International communication certainly requires having conversations in another language. How do you manage this?

Giving sales seminars, I have had interpretation (verbal) and translation (written) in Chinese, Spanish, French, German, Turkish, Hebrew and Arabic. Sometimes, I only used interpreters along with original English-written training manuals.

My manuals used a lot of graphs, charts, cartoons and other images as much as possible, as in many cases the education of the sales people was not very high. Therefore, even in their native language, reading skills were quite low. When written translation is required in the training manual, I demanded the layout stay the same and only the text translated into the required language.

Bear in mind, I was involved in sales training. Therefore, I was teaching a skill (active knowledge) which is different from direct education (passive understanding). In order to be successful, I had to cover the same material in different ways at least three times. I presented the features of a vehicle in the seminar room. Then, we went out to the vehicle, and I presented the same features as if I was a salesman and the group were my customers wanting to buy the vehicle. After that, I set up a role playing contest where six participants gave presentations to the group. With that repetition, the group learned not only what the features were but also how to present the vehicle to their customers. I had role playing for finding customers, meeting customers, finding out what customers wanted and negotiating price and terms of payment as well.

In Japan, I just speak directly in Japanese. I write Japanese as well, but my speaking is far better than my Japanese writing ability. Unusually, I have my written Japanese edited before distributing it to the targeted reader.

I only used translators when giving sales seminars. Sometimes the Isuzu Sales Department hired the translator but mostly the local dealership/distributor/assembler did the hiring or used their own staff. I totally relied on others when translation was needed.

International communication also requires paying attention to culture. Do you use the “low context” and “high context” model - where Japan is typically a high context culture and Germany is a classic low context country?

In general, I think that translation material content and reader education levels are far more important factors when determining “low context” and “high context” information. How specialized and educated the readers are will most likely determine the context level. Using technical terms can confuse non-technical people in any culture. I tend to favor flow-charts, graphs or other illustrations over straight text wherever possible. They can better communicate across cultures, specialties and education levels.

Regarding sales training, I answered that above. Currently, I’m working with The Netherlands, Sweden, Germany, Switzerland and the US all in English. That is for The Open Organization project I mentioned above.

I’m working in both Japanese and English for Japan related speaking projects.

Overall, I would guess my translation related projects have been closer to the “low context” level (the sales training material).

You mentioned Japan being “high context” above, but in many cases, cartoons and “manga” are heavily used in education and advertising. Interestingly on the other hand, when watching Japanese TV, written text is often pasted at the bottom of the screen.

What tips for cultural interaction do you recommend for people who are working across countries/cultures? For example: should folks learn a phrase or two for their meeting, or should they bring small gifts, or wear a certain color?

My first recommendation is to determine if you want to provide a skill or just knowledge. If it is a skill, consider cutting the content down and increase repetition. Also, develop exercises for them to practice, not just giving presentations or offering articles for them to read.

Secondly, I would consider increasing graphs, tables and illustrations to cut through language concerns.

I have found using a few local phrases could break the ice, but I haven’t found them that important. More important is learning in advance why those people are there and what they want to gain in the meeting. Knowing that will help you prepare the material they most need. About gifts, clothing or colors, beforehand I would ask a local representative what would be most appropriate to make a good first impression. I had participation giveaways for my seminars and prizes for presentation contest winners.

Regarding dress, what you want to do is impress them enough, so they will respect what you have to say, but be casual enough to relax the group, so they will speak openly. I have over dressed in a suit and tie many times. So, I took my jacket and tie off right in front of them to relax the group. Sometimes, I would even roll up my sleeves. Furthermore, I always stood up when presenting to keep the group's attention.

I noticed that good 2-way discussions can be achieved with groups of up to 20 people. Above that leads to a formal 1-way presentation, and possible Q and A after the presentation about the content.

I think the biggest pitfall is making assumptions of things you personally think are clearly obvious. In other cultures with different experiences and environments, things might not be that obvious and must be explained in more detail. Also, continually confirming understanding as to what was said should be deliberately and regularly done. I often asked: "What do you think about…?" or "What are you doing now and how does it compare with what I'm recommending?"

In your experience, what tips would you recommend to a new leader who is doing their first in-person meeting with a person from another culture?

I would recommend confirming what the group wants to achieve by attending the meeting. For me in Isuzu Motors, it was mostly to help people learn a selling process that they could use throughout their professional (and in some cases personal) life.

I would also try to keep the group to less than 20 people.

I would volunteer to write the agenda of the meeting and the minutes afterward. You know your written communication skills, but you don't know the level of the other party, particularly if English is not their first language. If you let them do those tasks, their English grammar might be fine, but the content will more than likely be thin for both agenda and minutes. I have done this successfully on several occasions as I made sure major concerns were documented.

If you give a presentation to a group or even in a meeting, when you make a proposal or give a comment, notice facial expressions of the participants and ask if you think they are happy, concerned or neutral. Based on what you see don't prejudge it, just ask follow-up questions to try to confirm that mood as gestures by region are different. From their responses, you can work on solutions and/or suggestions to move forward.

The meeting environment matters. Consider arriving at the location a half day early to review the meeting room, layout of chairs, handout material available in the right quantities, projector set-up, microphone, and so on. Is it quiet and appropriately enclosed?

If the meeting is for a 1-way presentation with Q and A afterward, a classroom seating layout would be fine. If it is more of a 2-way discussion of the material presented, a "U" shaped seating arrangement would be better, so people can talk to and see each other. I used this layout the most, as I hoped for discussion regarding what I was recommending and what was happening in the country itself.

If I could identify the most experienced person in the room, I would redirect questions to that person. I could give general concept answers, but the local person could be far more detailed. Also, he more than likely will be more credible than me. I even let him explain his ideas in the local language. I have experienced this mostly in Spanish, French, Chinese, Turkish, Hebrew and German.

About the Editors

Jim Hall is an open source software advocate and technical writer. At work, Jim is CEO of Hallmentum, an IT executive consulting company that provides hands-on IT Leadership training, workshops, and coaching.

Blythe Williams earned her BS in technical writing and public health from the University of Minnesota. Currently, Blythe is studying to become a writer for health firms in the Minneapolis area.

Thanks

We want to thank everyone who has shared their leadership experiences for this book. Coaching Button is an open community of everyone who practices leadership, and we value everyone who is part of that community.

Leadership means stepping forward and providing a vision, and getting others on board to advance that vision. And we believe that everyone can step into a leadership role, whether they are in a typical “leadership” role such as a CEO or CIO, or someone in a staff position who has stepped up to lead a project, initiative, or effort.

A Chief Information Officer or IT Director might lead in a different way than someone in a traditional “staff” role, but we all provide leadership in our own way. If you have shared a vision and helped others to get there, you are a leader.

That means you don't need to have a traditional “leadership” title to share your story with our readers. Everyone can step into a leadership role, and we want to hear from you about your leadership experience.

We invite you to contribute to Coaching Buttons. Provide your leadership perspective, pen a leadership essay about a current topic, or share your best practices. Our readers want to hear from you! Join us at *coachingbuttons.com*