BOSSA nova Probes - These probes are covered in:

Company-wide Agility with Beyond Budgeting, Open Space & Sociocracy
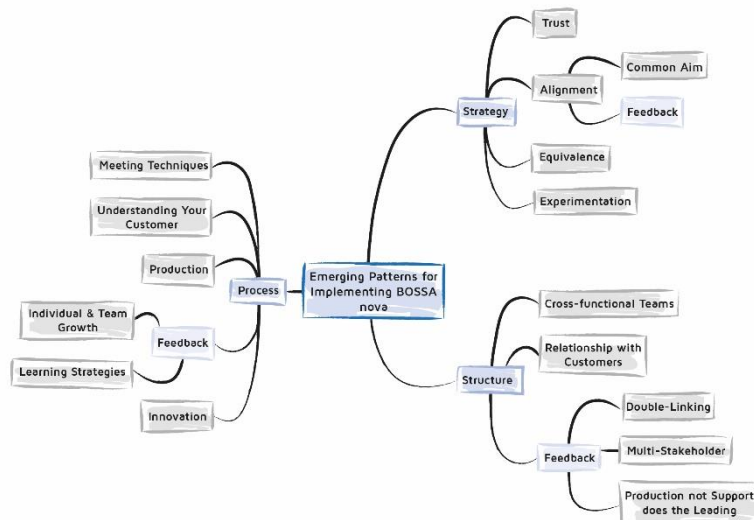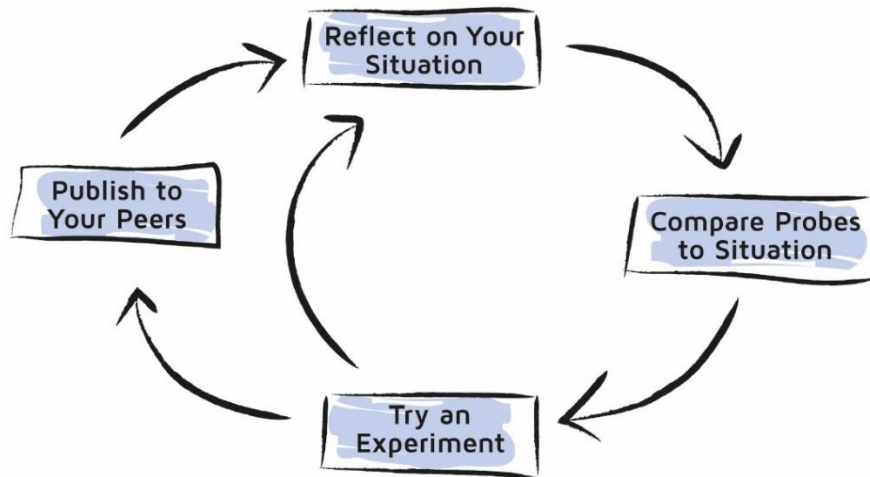
Survive & Thrive on Disruption

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We converted the probes to this format so they could be printed on cards. If you don't have the book, get it. If you have the book and haven't read it, do so now. The book contains background material not included in these cards.
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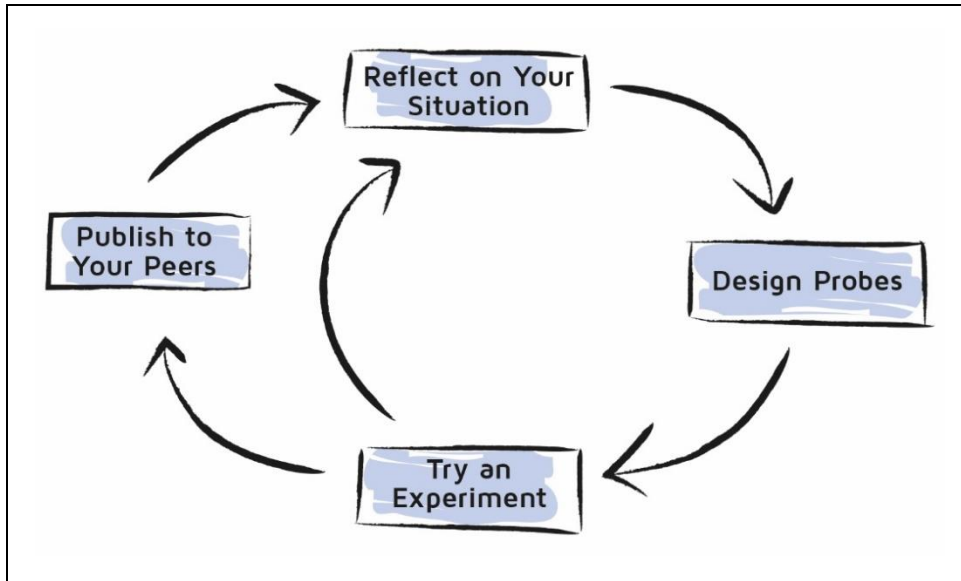
Name of Probe

Background

Hypothesis

Experiment – Please don't forget to make the experiment safe for everyone impacted and do a pre-& post measure for the experiment.

Category the probe belongs to

Do we need standardized metrics?

A classic problem of large, successful organizations is that their bureaucracy becomes oppressive. The bureaucracy assumes that people are not inclined to use their common sense and are only looking for their own personal advantage.

Standardized reporting procedures give the illusion of an accurate picture of what's actually happening. Self-reporting would let us see what is actually happening.

Set aside a time for members of a reporting unit, including the person they report to, to reflect on how they might be able to describe in succinct ways how to let the others know what is actually happening with their work and them to get feedback on what they are doing.

Strategy – Trust

Is Trust Cheaper?

Traditional travel expense procedures are burdensome and assume people can't be trusted.

Such procedures cost more than they save and are demoralizing.

Pre-survey and audit. Try for three months in a few units with other units as controls. Post-survey and audit.

Strategy – Trust

Can we improve collaboration by changing the incentive system?

The overall strategic aim defines both an objective but also a boundary for objectives. This leads to members of the organization not collaborating but focusing on a personal advantage.

The reason people are not collaborating effectively is that their individual objectives are not aligned.

Have one group create & model what it would be like to have different incentive systems. Have them using the new system for 3 months. Possibilities include: no one has a personal office, "points" to reflect personal learning & development achievements, periodic "appreciations parties," pooling the bonus & decide jointly on it, peer reviews & stack ranking... Identify a similar group as control.

Strategy – Alignment – Common Aim

Can peer decision-making about promotion support alignment?

Even at very egalitarian companies like Valve and Red Hat there are hierarchies and these require a promotion system.

If we use peer decision making to make decisions about promotions, we can separate performance review from decisions such as promotion that have an element of competition.

Groups at different levels of the hierarchy in the company use:
• Sociocratic election to determine who is appointed for a promotion.
• Consent decision making on the person being promoted from a pool of applicants.
• Consent decision making for aligning individual and team objectives.
• Consent decision making for deciding on bonuses.

Strategy – Alignment – Common Aim

How can we have autonomy as a team while supporting the organization's purpose?

Your team is not focusing on the things that are the most important, but is coming up with one idea after another one.

The overall goal (i.e. customer focus) is not clearly understood. Giving direct exposure to the customer will focus the team on customer needs.

Arrange for some team members to walk and work with the customers and learn about their demands by experiencing the customers' work themselves.

Strategy – Alignment – Collective Ownership

How can we leverage the existing network?

In every company there are many trust networks in place for different kinds of work. The leaders of these networks often powerfully influence the dynamic structure of the company.

If we identify hidden trust leaders and get them together, they will, together, be able to improve the company's alignment for customer focus.

Conduct surveys to determine "who in the company do we trust the most regarding our relationships with our customers?" The persons identified build the trust network that aligns for customer focus. Invite them to build jointly the company's culture by coming up with improvements such as decreasing the response time for customers' requests, repeating business, or minimizing waste.

Strategy – Alignment – Collective Ownership

Is there an alternative to short-term profit focus?

The board notes that long term customers are leaving although you are still attracting new customers.

We are damaging our long term profitability by focusing on quarterly profits and cutting costs and services to keep boosting immediate profit. If we release a selected department from our latest cost cutting, they will get long term customers to return and customer attrition will diminish.

Hold a simulation in which customers participate or the team creates a persona that approximates customer reactions to various scenarios. Have scenarios not/implementing cost cutting. The measurement would focus on the personas team's subjective reports on their different experiences.

Strategy – Alignment – Feedback

Will aligned individual growth happen without motivation by a bonus?

Often individual objectives are not revisited and if the market changes, the objectives might become out of date.

If we separate bonus/incentive payments from the learning process, individual growth will happen in alignment with the company's strategy.

If you have changing conditions, increase the frequency of performance evaluations weekly, monthly, quarterly. use qualitative Objectives and quantitative Key Results (OKR). The OKR are defined bottom up rather and are always a contribution to the company's overall goal.

Strategy – Alignment – Feedback

What would happen if we emphasized transparency company-wide?

For confidential reasons (and not trusting what will happen if people will know) information is often kept as a secret.

If information is made transparent the organization can benefit by inviting everyone to develop ideas for improving the situation. *As a result the level of trust and commitment will rise.*

For your next issue, invite everyone involved or interested in it to a meeting. Make the company's background & constraints of the issue explicit. Collect everyone thinking on how to handle the issue and consider these ideas in an approach everyone consents to. Hold a retrospective to go over the results. Should such experiments be expanded?

Strategy – Equivalence

Can we be more scientific?

Innovations in the way you organize your group intelligence, are considered a trade secret. Companies learn the same lesson in isolation as are units of the same company.

Increase cross-company collaboration thinking by sharing lessons from experimentation.

Set-up a peer-reviewed journal for reporting experiments in management practices (time-box). Monitor number of contributions, reviews, searches & uses.

Strategy – Experimentation

Can we really learn from failure?

"Fail fast" and the like often lip service

Top management acting as a role model creates a culture of error tolerance.

Pre-measure transparency about uncomfortable information. Try for three months to publish mistakes, uncertainties & learnings. Post-measure.

Strategy – Experimentation

Is cross-functionality actually useful?

Cross-functionality often appears in traditional organizations only in crises when they create a task force consisting of everyone who knows about the crisis and give them carte blanche to solve the problem.

We know how a cross-functional task force helps solve crisis problems, why not implement it as a regular practice?

Identify a persistent, high importance but non-crisis problem and facilitate formation of a cross-functional team with relevant areas of expertise, and strongly empower the team to resolve it. Identify another problem as a "comparison problem" and don't change current responsibility for solving it. Compare the results.

Structure – Cross-functional teams

Can reflective meetings improve customer relations?

It seems regardless of type of business there is not enough reflective time spent considering how well are we serving the customer.

If we establish regular reflective meetings at every level of the organization, the quality of customer service will increase.

In a few specific units of the organization, establish a rhythm of regular meetings to reflect on how well the unit is serving its customer. Have a product owner present, or designate someone to serve in that role. In determining what adaptations are needed for better service, make decisions only by consent. Identify other related units as controls. Compare the results.

Structure – Relationship with Customer

Can our board of directors have the CEO and an elected representative on it without interfering with the work of the board?

There are many philosophies and even legal restrictions about who can be on a board of directors.

A board can experiment with changes in its structure and membership even if those changes appear to be prohibited by regulation or its bylaws by using a "committee of the whole."

Establish a committee of the whole. Invite the CEO and an elected representative (the double-links) and a few outside experts. Make decisions using consent. After each meeting, have a 1 minute official board meeting to adopt the decisions made by the committee.

Structure – Feedback – Double-Linking

Should we change our legal structure?

If you experimented with having the CEO, an elected representative, and outside stakeholders on the board you may want to take the next step and anchor this arrangement in your legal structure.

If we change our legal structure to incorporate BOSSA nova principles, there will be a big benefit from focusing the passion of the staff and their increased commitment to the company.

We can probe this possible step by using our informal networks as a way to conduct indirect experiments that would be challenging for us to do by ourselves. Talking with our networks would be the equivalent of doing our own research. Research business community networks.

Structure – Feedback – Multi-Stakeholder

Would it be worthwhile to establish mindful partnerships between production and support service teams?

Many support service teams such as quality control, HR, or finance, tend to be more controlling than supporting and tend to come in too late in production processes.

If support service teams understand that production is their direct customer, or in other situations vice versa, they can be proactive in working together to serve the company's external customers.

For a specific project, production invites the applicable support service teams at the lift-off and treats them as stakeholders. Measure the results by asking "How is the support service team/production relationship going?" in every retrospective.

Structure – Feedback – Production not Support does the Leading

Can group reflection improve problem solving?

Teams often jump to solutions before they understand the situation or the context, i.e, before they have a clear picture of the challenge they face or the opportunity before them. The discipline of picture forming before searching for solutions addresses the need to have a common understanding. "Picture forming" basically means group reflection.

If we strictly enforce picture forming as the first step in addressing any opportunity or challenge, teams will accurately "nail the problem."

Identify two teams representing a cross section. Pre-measure their understanding of problem. Teach one team picture forming, emphasize that they should avoid suggesting solutions. One month later repeat the pre-measure as a post-measure.

Process – Meeting Techniques

How can we include customer feedback in each board meeting?

Not every decision by the board is in the best interest of the customer.

If a board checks its proposed decisions by asking, before each decision is finalized, "How will our customers be impacted by the decision?" the quality of its decisions will improve.

Before formally adopting a proposal, the board meeting facilitator asks each person present, "How do you think our customers will perceive and be impacted by this proposed decision." If any board member expresses doubts about the positive impact for the customer, the facilitator guides decision improvement.

Process – Meeting Techniques

Can our customers learn from us and would that be attractive to them?

The software industry has become expert in using Agile to build customer learning. It is not so clear how to give customers this experience in other business domains.

By giving customers the chance to interact with your business process, by introducing personas for them to self-identify, and by creating learning opportunities, the customer will be more engaged, loyal, and do repeat business.

Reflect on your (potential) customers. Visit & talk with your customers or observe them to understand their struggles. Determine ways to involve your customers in your processes that provide them learning.

Process – Understanding your Customer

Can you have a process that is "in flow?"

Competition brings pressure to reduce wait times. Customers don't like to wait. Flow is not just about eliminating wait times. Sometimes you need lag time for getting into flow.

If we assign a cross-functional team to focus on eliminating waste and optimizing process time as a way to optimize customer experience, we are more likely to get our systems into flow.

Identify a customer interaction that is critical to optimize and have a cross-functional team focus on it. The team should include customers, or a representative, or personas. Do a value stream analysis and look for particularly long wait times. Find a nuanced way to balance waste optimization and lag times that ends up "feeling right".

Process – Production

Are performance evaluations really reflecting customer focus?

Company values are often lip service, other values often rewarded.

If customer focus is the foundation for performance evaluation, customer satisfaction improves.

Invite an experimental unit to write own performance evaluation criteria related to their work & reflecting customer interests.

Process – Feedback – Individual and Team Growth

Would creating a regular rhythm of team learning and reflection increase customer satisfaction?

In software departments using Agile, it is a common practice to have regular retrospectives. This practice has largely not been adopted by departments performing other kinds of work.

If we inject a regular pattern of reflection and learning into the work routines of units their performance will improve.

Investigate to find a variety of work units in your organization that do not schedule regular times to reflect and learn. Determine how to measure customer satisfaction for them. Get their agreement to insert regular reflection and learning times into their schedule. Measure customer satisfaction at regular intervals for at least six months.

Process – Feedback – Learning Strategies

Can we organize transformative learning?

Continuous learning steadily accumulates new knowledge and skills. However, sometimes there is discontinuous learning, e.g. when you get a sudden new insight that changes your basic framework and assumptions. This is referred to as transformative learning.

We can create a disciplined process for collective transformative learning.

Identify a unit in your company. Have the unit spend a day in an Open Space format to focus in the morning on: "What are the basic assumptions underlying the way we are working?" In the afternoon they should focus on: "What if those assumptions were not true?" Ask them to reflect at the end of the day & after 3 weeks about the value.

Process – Innovation