

THE GUIDE TO INVITING LEADERSHIP

Invitation-Based Change™
in the New World of Work

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SHEFFIELD

THIS GUIDE CONTAINS EXCERPTS
FROM

INVITING LEADERSHIP

INVITATION-BASED CHANGE™
IN THE NEW WORLD OF WORK

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The Guide to Inviting Leadership: Invitation-Based Change™ in the New World of Work

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Welcome

Welcome to the new world of work.

- Today's workforce is becoming increasingly mobile
- Changes that affect businesses are accelerating like never before
- The dominant influence on your organizational culture is how authority is distributed

You're probably an organizational leader of some kind if you are investigating this book. And you are leading in a period of unprecedented change. The changes facing you and your company represent a need for a fundamental shift in leadership style. There is a shift required of you and your company. You must now be more flexible, more adaptable, and more innovative.

Just to keep pace.

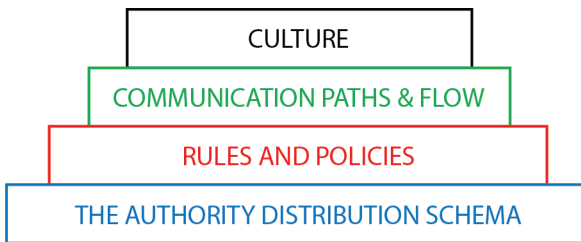
Understanding the art and science of genuine invitation may be the most important and valuable business leadership skill of the 21st century. Here is why: invitations from leaders create the fertile conditions for higher levels of employee engagement and employee morale. It is this greater level of "employee energy" and employee awareness that makes your enterprise more competitive and better equipped to effectively respond to all kinds of change.

To be effective in this new world, businesses must continuously "sense and respond."

And gaining that capability, in a genuine and lasting way, for the organization you help lead, is what this book is all about.

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THE DOMINANT INFLUENCE ON YOUR COMPANY
CULTURE IS HOW AUTHORITY IS DISTRIBUTED:



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The Culture Stack

Why Read Inviting Leadership

Your competition is now just one click away.

Societal trends are now largely driven by software technology. And technology moves fast. Regardless of what business your company is in, if it does not have a strategy for keeping pace with ongoing changes in technology, then competing in the markets you serve becomes more and more difficult and may ultimately lead to a crisis: an urgent need to radically change.

This is the reality of business today. Technology matters. What we call I.T. used to be considered a “cost center,” a kind of tactical expense to be *minimized*. But the companies that are winning in this new game realize that I.T. has the potential to be a center of *innovation*, a big part of *strategy*: a capacity to be *maximized*.

Agile and Digital Transformation

So-called “Agile transformation” and “digital transformation” are actually responses to the need to better respond to the business impact of technology. “Agile transformation” is about implementing radically more efficient ways of producing software. This includes software for sale to customers and software to support ongoing business operations. “Digital transformation” is about integrating digital technology into *every aspect of the business*, in service to better business outcomes.

Your competition is now just one click away. That is the reason you want to be reading this book.

Pivoting as a Leader - from Commanding toward Inviting

The traditional way of managing—through the exercise of formal authority—simply cannot keep pace. Indeed, it is only when individuals and teams are deeply engaged and self-managing that the entire enterprise can sense and respond to change in a timely, efficient, and effective fashion. Business opportunities are now more frequent and of shorter duration. Addressing these opportunities requires real agility. Self-management helps everyone to pay attention to and manage change. It is self-management that creates a more engaged and therefore responsive organization.

And it is invitations from leaders that create the conditions for self-management.

The Core Principles of Inviting Leadership

These principles inform the policies and practices of the Inviting Leadership approach:

Feedback Is Essential: Gathering and responding to continuous feedback is essential to leading effectively

Leaders are Designers: Leadership has a very substantial design aspect, including the design and definition of clear goals, clear rules, and very clear ways for the workforce to measure and experience progress.

Invitation Is An Ask: Invitation triggers decision-making and substantial employee engagement. Invitation is often superior to delegation, especially during periods of change.

Engagement Wins: A focus on engaging the workforce results in positive business outcomes.

Systems Are Complex: Business enterprises are complex adaptive systems that respond dynamically to change.

Each chapter develops each of these principles in much more detail.

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Who Should Read Inviting Leadership

- **Formally Authorized Leaders:** Those who get their authority from the organization's formal hierarchy. This includes company leaders, CEOs, CFOs, CIOs and others with a "C" in their title. Also included in this group is anyone who is a mid-level executive, such as a Director or Manager.
- **Informally Authorized Leaders:** Those who get their authority from peers, co-workers and others with whom they work. Such leaders may or may not have a big title, a big salary, or lots of people reporting to them.
- **Internal Facilitators, Scrum Masters, and Team Leads:** Employees in organizations who serve teams by facilitating meetings, designing meetings, and delivering organizational-change initiatives such as the adoption of Agile software development.
- **Executive Coaches, Management Consultants and Agile Coaches:** Those who serve organizations by providing guidance, teaching and mentoring in pursuit of continuous improvement.

Inviting Leadership introduces invitation as a leadership art, explains how this style of leadership operates, and provides tools and resources for your learning journey.

We hope you find the book to be valuable, immediately useful and fun.

We hope you enjoy reading it.

Authority

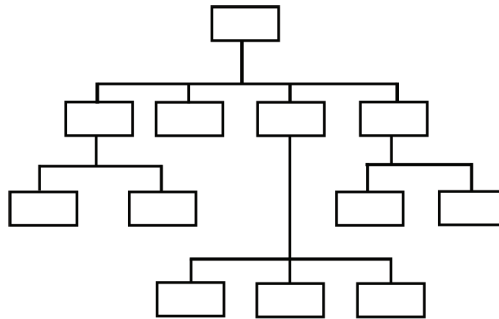
authority *n.*

1. The right or permission to do a specific kind of work.
2. Status within a social system that confers one's right to do work.

Structure

People commonly use the word “structure” to refer to the way authority is distributed within a group. In other words, it is the group's authority distribution schema.

Formal authority is mapped by an organizational chart similar to the one shown below. Formal authority is managed from the top and flows downward. The distribution schema is rigid and fixed ... at least until the next formal reorganization. The roles near the top have the most authority; those near the bottom have the least.



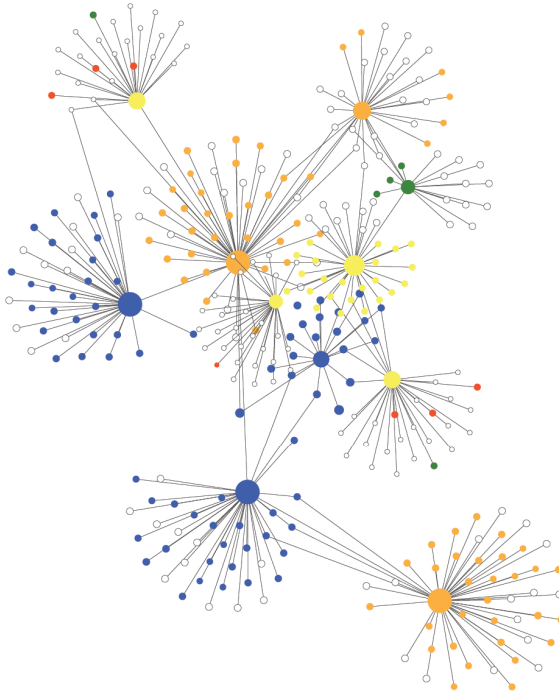
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The Formal Authority Schema

There is another, mostly undocumented web of friendships and relationships that influence decision-making. People tend to call this informal, less-obvious web the “politics of the group” or “the way things get done.”

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The formal authority distribution schema (organizational chart) tends to be public. The informal one does not. Informal authority is self-managed. It originates from many sources and is always moving as it dynamically responds to change.



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The Informal Authority Schema

We informally authorize specific people to be *leaders*. Problems that arise are dealt with quickly. For example, if someone suddenly acts like a “control freak” they may suddenly lose the level of informal authority they need to make decisions for the group.

Authority is legitimate (or authentic) when the people who are affected by the decisions actually support (or authorize) someone to participate in making decisions for the group.

Natural authority, or what we call self-authorization, is the act of sending authority to yourself instead of receiving it from

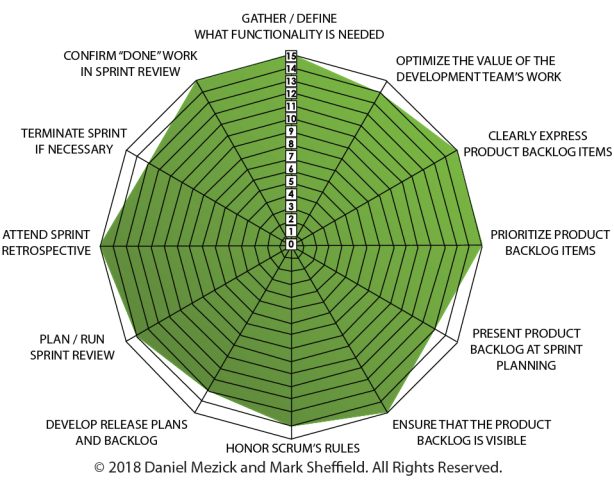
elsewhere. When you self-authorize, you need to be prepared to “ask for forgiveness, not permission.” Self-authorization can be risky in organizations since it involves testing boundaries.

Personal Authority

personal authority *n.*

The way a person in a formally authorized role takes up that role.¹

In the workplace we like to believe that formal roles are well described by formal job descriptions. An authority map shows the degree to which an individual in a role is using their authority to execute on specific tasks and decisions.



Authority Map of a Well-Filled Role

Low coverage on a task indicates an authority vacuum which likely will be filled by an unauthorized person, resulting in poor decisions, less valuable work being done, and team morale being destroyed.

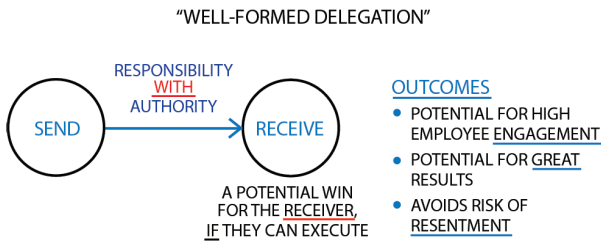
¹ For more information about personal authority, see www.invitingleadership.com/book/links/#BART.

Delegation

delegation *n.*

The formal assignment of responsibility and/or authority to someone in a lower-authority role.

Delegating is assigning. The sender expects the receiver to accept the assignment; there is seldom any opportunity to opt out. This means the receiver is under compulsion and must receive the delegation. A delegation is an order.



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Well-Formed Delegation

Ideally, delegation includes responsibility for getting work done *and* the authority to access the essential supporting resources that are needed to achieve success. These resources can include access to a budget, physical space, the help of a wider supporting team, etc. The key point here is that where delegation is concerned, responsibility and authority are distinct. Both can be delegated individually, or together.

Well-formed delegation includes responsibility and authority. It has a potential for high employee engagement and great results. Well-formed delegation also provides the receiver with a potential win if they can execute.

Malformed delegation omits authority, creating a “no-win” situation for the receiver. It leads to disengagement, resentment, poor results, and potential for failure.

With invitation there is no compulsion. The receiver decides whether to accept or decline the invitation. With invitation, the receiver can opt out of any “responsibility without authority” situations. With delegation, they cannot.

Boundary

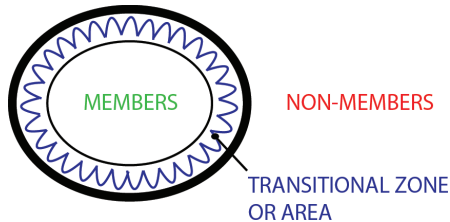
boundary *n.*

A line of demarcation that defines the limits of an area.

Types

A boundary line that is connected end-to-end forms a container. The closed perimeter defines what is in and what is out.

Some boundaries are simple and thin. Others are thicker and wider, providing a stronger barrier. A very wide boundary line can form a transitional area around the container.



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A Boundary Line with a Transitional Area

A doctor's office with a reception area is a good example. The exterior wall and door(s) provide a thick, protective barrier. The inner door provides a thinner barrier between the transitional reception space and the inner office.

Authority Boundaries

If you are inviting people to execute specific tasks, you must be clear about who has authority (permission) to do what. The classic pattern of "responsibility without authority" will not be well received. Organizations are in part defined by various boundaries such as authority and responsibility limits.

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Regarding Decision-Making Authority

The most important kind of authority is the authority to participate in decision-making that effects entire groups. Making decisions is fundamentally engaging. If you are inviting people into decision-making, and we hope you are, then you must be very clear about the scope and limits of that decision-making.

Task and Responsibility Boundaries

Tasks must be defined clearly and have solid “Definition of Done” measurement criteria that makes it easy for the person doing the task to experience progress. Responsibility for a task must be accompanied by the *requisite authority* needed to accomplish the task.

Time Boundaries

Tasks, responsibilities, and authority can be bounded by time. A particular role can start and end on a specific date. Events can begin and end at specific times. The “RSVP” of an invitation establishes a time boundary. Deadlines are important boundaries, expressed in units of time.

Territory Boundaries

Territory includes authorized access to meeting spaces, work spaces and other physical things such as tools and supplies. What territory is authorized for use or not is an important boundary definition in your leadership invitations

Budget Boundaries

Money is a scarce resource. It is important to use clear and unambiguous terms to express who has decision-making and spending authority, and to what level, event, and limit.

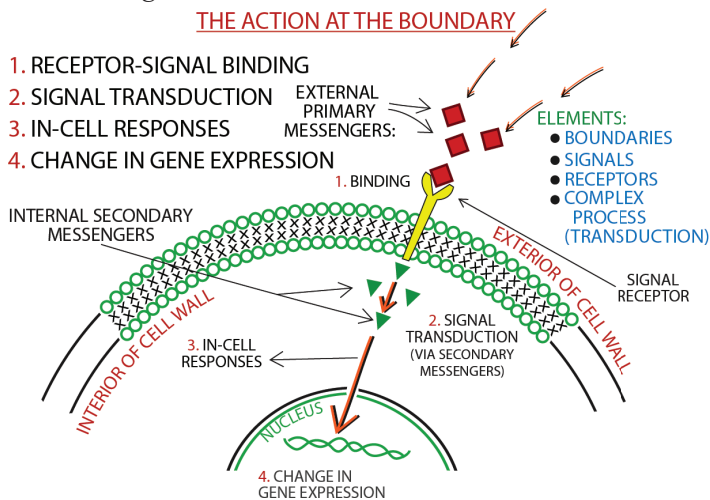
Leadership Invitations Have Limits and Constraints

Leadership invitations can be used to test the ability of the organization to change, to test the willingness of employees to engage, or to generate feedback about the workforce.

What Happens at the Boundary

Consider the boundaries of a cell, the basic building block of all life. Every cell has a cell wall; the interior of the cell contains cytoplasm. Cell walls contain receptors which “listen” for “signals” in the form of molecules. When certain kinds of molecules interact with the receptors, this interaction can trigger processes and actions on the other side of the cell wall boundary, inside the cell.

People, teams, and organizations are sensitive to signaling that occurs along their boundaries. Anything that impedes the flow and processing of signals can reduce overall living system health and functioning.



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Action at the Boundary

Almost every living cell has a nucleus. The nucleus regulates cell functioning and contains the replication information – the DNA. It is a little-known fact that a cell can and will continue to survive for some time even if the nucleus has been removed. Without the nucleus the cell does not function but it is still very much alive. If the membrane that encloses the cell is breached, the entire cell quickly dies. A breach at the cell boundary threatens the very life of the cell. The lesson here is that boundaries play an essential role in maintaining the health of living systems.

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Life at the cellular level implements very intricate procedures at the boundary. The boundary of a cell contains receptors that “listen” for certain molecules as they pass by. These “signaling molecules” are recognized by some cell types and ignored by others. The cells that recognize a specific kind of signaling molecule do not all respond in the same way. The responses vary according to cell function and other factors. These signals are received as the receptor “binds to” a signal molecule. From there, the cell is triggered and responds according to its design and function. “Secondary” messenger molecules inside the cell may become active and generate a substantial response-process inside the cell.

Boundaries in Social Systems: Groups of People

Social systems are groups of two or more persons. Families, soccer teams, and circles of friends are all social systems. Each group has a boundary that defines who is a member and who is not. Groups process signaling and messaging at the perimeter just like cells do. Some group members are leaders. Leaders manage the process of making decisions that affect the whole group. The leaders’ signals to other members inside the group are the most important signals in the entire system. Inside social systems, the signals contain sociological rather than biological meaning.

Groups respond to internal (“inside the group”) and external (“outside of group”) signals. If you signal well, those who are listening for your signals can respond quickly and in the way you intended. If you signal poorly, you can expect the response to be muted as the recipients of your signals try to figure out what the signals mean.

Adaptive organizations are highly sensitive to signals from the environment and from external sources. Less adaptive organizations are not at all sensitive to these signals.

Clear understandings and related protocols for communication inside the group open group awareness to the wider environment. Group sensitivity to these external signals is a function of leadership effectiveness. If the leadership is effective, the group will be high-functioning.

Invitation

invitation *n.*

1. The act of offering someone the opportunity to go somewhere or do something.
2. A written or verbal offer for someone to go somewhere or to do something.
3. A situation or action that tempts someone to do something or that makes a particular outcome likely.

Note: A genuine invitation may be declined without any sanctions or other implied or expressed negative consequences.

An invitation is a kind of test, a test of the receiver's willingness. An invitation tests the willingness of the receiver to go somewhere or do something. This test generates feedback.

It must be OK for the test to return negative results. It has to be OK for the receiver to decline (to not accept) the invitation. If the recipient of an invitation cannot opt out, the so-called "invitation" is really a directive.

Invitation and Games

Good games (the kind of games that are actually fun to play) have four essential properties, which were originally identified by Jane McGonigal in her book *Reality is Broken*:

- A very clear goal
- Very clear rules
- A way to track progress
- Opt-in participation

The opt-in aspect is essential. All potential players are *invited* and *not compelled* to participate.



Attributes of a Well-Formed Invitation

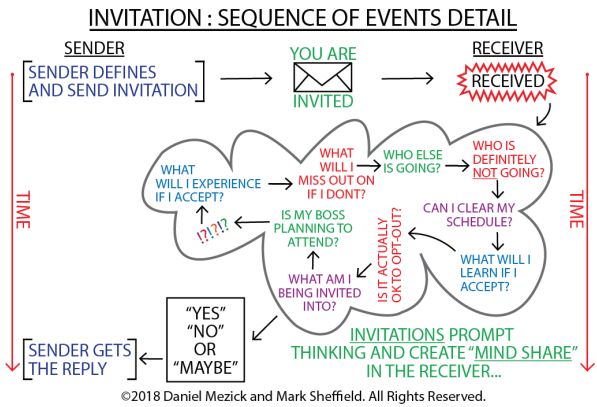
This connection between games and invitation is fundamental. We can use it to structure invitations so that they are easier for the receiver to understand and accept.

The Sequence of Invitation Events

The receiver does most of the processing: receiving, studying, considering, checking schedules, perhaps speaking with others about the invitation, and replying.

The sender is doing some processing as well. Any genuine invitation has these two characteristics:

- The sender does not rush the receiver to respond
- The sender does not demand any explanation if the receiver declines



The Invitation Sequence in Detail

There are several steps in the invitation process:

1. **Sender designs and sends the invitation:** The design is important. We recommend that you use the four essential properties of a good game.
2. **Receiver receives the invitation:** The invitation may be delivered in the form of a letter, an email, during a conversation, or some other way.
3. **Receiver studies and considers the invitation:** This is where it gets complex. We do not know why a receiver declines an invitation, so we cannot attach too much meaning when someone declines. There may be multiple reasons for declining. The sender is responsible for making sure that the invitation is clear, and for waiting for the receiver to respond.
4. **A normal delay occurs:** It's totally normal for people to wait before responding to an invitation. They will think about it. They may talk to others who are invited. They may instinctively "never commit early unless they know why." Every invitation is a kind of *option*. Options have value and options expire. Until the option expires, there is little or no cost for delaying. When the option expires, any perceived value evaporates instantly. Most people wait until they are at the threshold of this boundary before responding.
5. **Receiver replies to the invitation:** When the time for deciding has arrived, the receiver replies with a "yes," a "no," or a "maybe."
6. **Sender gets the reply:** When the sender gets the reply, it will be one of these types:
 - An active YES
 - An active NO
 - A passive NO (time expires), for example if someone says "Please leave it on my desk, I will look at it later," and then never does
 - A MAYBE (unless otherwise prohibited)

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After a genuine invitation is received, the receiver is in charge of the timing of events. The sender is not.

The people who respond will likely be the ones who are *passionate* and *responsible* about the task. These are the people who are motivated enough to engage authentically in supporting and helping to lead your initiative.

This is the primary difference between delegation and invitation. With invitation there is a far greater likelihood you will find an aligned, motivated, and willing person (a “passionate and responsible” person) to fill the role you have in mind.

Invitations also send important signals about trust and respect.

Psychological Safety and Respect

Invitation fundamentally respects the receiver’s interpersonal boundaries. This is a major strength of Inviting Leadership. Invitation is fundamentally respectful of the receiver because the receiver is in charge of what happens next. Instead of forcing compliance or using coercion or persuasion to get agreement, an invitation makes an offer and then waits for a response.



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The Safety Stack

Ideally, your leadership will produce great results. Great results come from an organizational ability to sense and respond to change. For this to happen, the people in the organization must be learning all the time. Fear reduces learning, so it is important to minimize fear. People need to feel safe enough to not be afraid of the boss, not be afraid of being fired, and so on. That safety comes from leaders who consistently signal respect and trust.

Self-Management

self-management *n.*

Taking responsibility for decisions that affect oneself and others. Self-management can be applied at the individual, team, and enterprise levels. A self-managed team makes most of the decisions that affect the work of that team as a whole.

Making decisions that affect the whole group is an authorized task of *leadership*. Self-management is actually active management of *the leadership function*.

To make a decision, you must consider many factors. There is often a nuanced range of possible responses at a decision point. There is also the timing of the decision and an assessment of the likely long-run effects of the decision being made. Making a non-trivial decision requires focus and attention. It is engaging. Engagement is necessary for self-management, which increases the capacity to sense and respond to change, to achieve great results.

GREAT RESULTS START WITH GREAT INVITATIONS:
THE RESULTS STACK

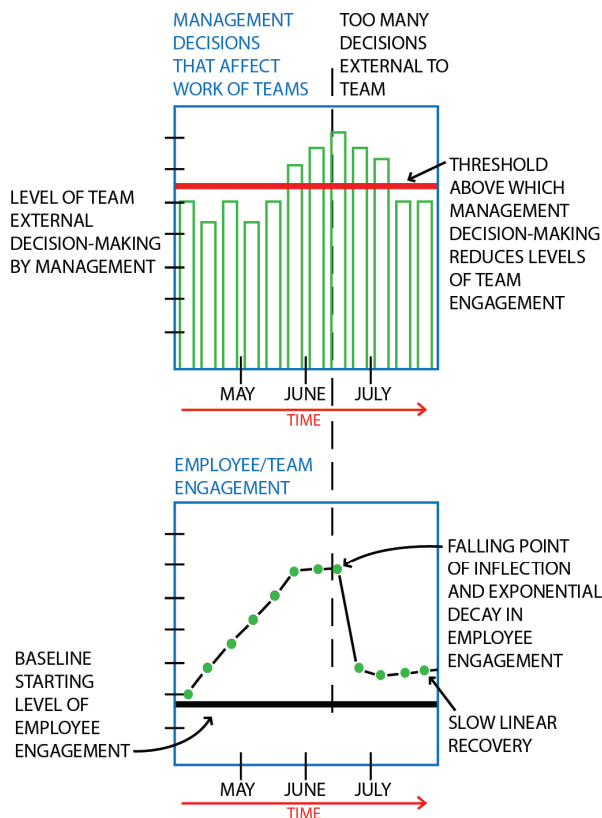
GREAT RESULTS AND OUTCOMES
CAPACITY TO SENSE & RESPOND TO CHANGE
SELF-MANAGEMENT
EMPLOYEE ENGAGEMENT
DECISION-MAKING
RECEIVING INVITATIONS

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The Results Stack

Decision-Making

If the frequency and magnitude of external/management involvement in decision-making that involves the day-to-day work of the team are above certain limits, *the result is exponential decay in the very emergent properties you are looking for.*



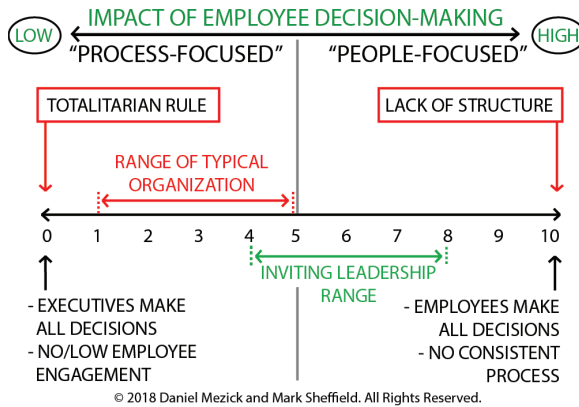
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Effects of Management Decision-Making on Engagement

The diagram above shows steady and constant management decisions that affect the work of teams. For the first five periods, the magnitude of the decisions remained low enough and employee engagement increased linearly. Then the magnitude increased above the threshold, resulting in tremendous decay of employee engagement. When this happens, it can take months to recover,

because recovery of an emergent property from *exponential* (non linear) decay is a *linear* process.

Too much centrally-planned decision-making results in “totalitarian rule” and very low levels of employee engagement. Too much decision-making authority for employees can result in a lack of consistent process and consistently good results.



Inviting Leadership Employee Decision-Making Impact

Typical organizations are skewed toward “process focus” and tend to be less responsive than what is required to thrive and grow. Decision-making is centralized and occurs very far away from where the environmental change was first observed. The bureaucracy associated with central planning and decision-making also causes delays. Previous plans have authors and sponsors. These individuals are invested in those plans, even when environmental change completely invalidates those plans. Meanwhile, employees begin to disengage as the few decisions they are allowed to make are frequently overridden and/or are not of much consequence. The result is an organization with a very low capacity to respond to challenges and opportunities.

A skew or bias towards “people focus” is the right approach if and when the level of ambient change is frequent and/or increasing.

The typical organization operates in the range of 1 to 4 on a scale of 1 to 10 in terms of the impact of employee-sourced

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decision-making. What needs to happen is a pronounced shift to the right, into the range of 4 to 8 on the depicted scale of 1 to 10.

When executives begin using structured invitations to motivate and engage the workforce, this shift can be achieved. The result is an organization with an elevated capacity to sense and respond.

It is important to focus on the fact that there is a range with a minimum and maximum boundary. If the impact of employee decisions is too low, then employee engagement levels will also be low. But if the organization-wide impact of those employee decisions is too high, then disorganization, “chaos” and wasteful lack of consistency in process and procedure will ensue and have a negative impact on business goals and outcomes. Each organization is unique and you will need to tailor and customize your implementation of Invitation-Based Change and Inviting Leadership to obtain the best results. The key takeaway here is that there is a range, and the results quickly decay at the boundaries of that range. The Inviting Leadership chapters on Boundary, Invitation and Leadership cover the mechanics of how to identify and implement the correct range for your situation and context.

An important aspect of self-managed employee decision-making is not just the impact of the decision on the performance of the organization. The *frequency* of these decisions is also important. If employees only make a few decisions a year, or otherwise are not engaging in decision-making frequently enough, the result will be on-again/off-again levels of employee engagement. The frequency of decision-making is an important factor in employee engagement. In fact, if you as a leader authorize lower-impact but higher-frequency decisions by employees and teams, you can raise employee engagement levels over the intermediate term and improve results that way. But the effects will be shallow and temporary instead of deep and lasting. Self-managed decision-making by employees and teams must be impactful enough to be meaningful and frequent enough to maintain optimal levels of employee engagement and the other related emergent properties.

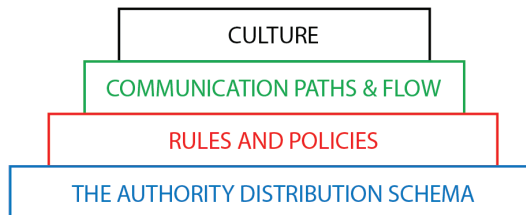
Leadership

leadership *n.*

1. Direct participation in making any decision that affects all of the members of a group.
2. An individual or set of individuals who participate directly in making any decision that affects all of the members of a group.
3. Exercising authority with respect to making decisions that affect all of the members of a group.

Attempts to improve communication and “culture” will fail, if you fail to address the “authority-to-make-decisions” aspect. This is because the “org chart diagram” is actually an “authority to make decisions” diagram. And how this authority *to decide* is distributed literally drives *everything* about communication and company culture. Therefore, to change culture, change the decision-making schema. Almost immediately, the way communications flow changes, and with that, some changes in key aspects of the culture immediately follow.

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CULTURE IS HOW AUTHORITY IS DISTRIBUTED:



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The Culture Stack

The lower two foundational parts of this stack are commonly called “the structure” which is a very imprecise way of saying “the authority distribution schema.” Authority may be distributed in a hierarchical scheme, or in some type of networked scheme, or in some other way. Let’s look at a predesigned scheme for effectively distributing authority for building great products: Scrum.

Example: The Scrum Framework

The Scrum Guide describes the Scrum¹ framework. The Guide’s subtitle is “*The Definitive Guide to Scrum: The Rules of the Game.*”

So. What is Scrum exactly? What we call “Scrum” is a set of roles, rules, artifacts and events that form a coherent system for rapidly developing and delivering complex products, such as software. Scrum originated in the software industry and has since been proven to be applicable anywhere that complex products are being designed, constructed and delivered.

If Scrum is a “framework,” then what kind of framework is it exactly? Here is our conclusion: Scrum is a framework that defines how specific *decisions* are made. **Scrum is an “authority distribution framework.”** The roles, artifacts, events and rules of Scrum clearly describe *who has the authority* to decide what.

Each role in Scrum has a set of authorized tasks.

The quotes below are direct quotes from *The Scrum Guide* (Note: the “Product Backlog” is a to-do list of prioritized work...)

“The Product Owner is the sole person responsible for managing the Product Backlog.

“...those wanting to change the priority of a Product Backlog item must address the Product Owner.”

“...For the Product Owner to be successful, everyone in the organization must respect his or her decisions.”

¹ For more information about Scrum see www.invitingleadership.com/book/links/#scrum.

The Scrum Guide is full of very specific statements defining the “authorized decisions” for each Scrum role. Implementing Scrum changes the way decisions get made and who makes them. This is why culture changes if you implement it well.

Aligning Decision-Making with the Value Stream

Real transformation involves changing decision-making such that the timing and content of those decisions maximize the flow through the value stream. No matter what kind of change you are seeking, and no matter what method you use to try to manifest that change,

Until and unless there is a change in the way decisions are made, there is no genuine “transformation” of anything at all.

Releasing Authority: All or Nothing?

There is a set of false beliefs that are held by many formally authorized leaders. These beliefs go something like this:

“If I authorize any substantial decision-making, I am giving away all my authority to make decisions and to lead.”

“If I authorize any substantial decision-making, I will introduce chaos.”

“If I authorize any substantial decision-making, I will lose all control.”

“If I authorize any substantial decision-making, I will be making myself and my role obsolete and therefore no longer needed.”

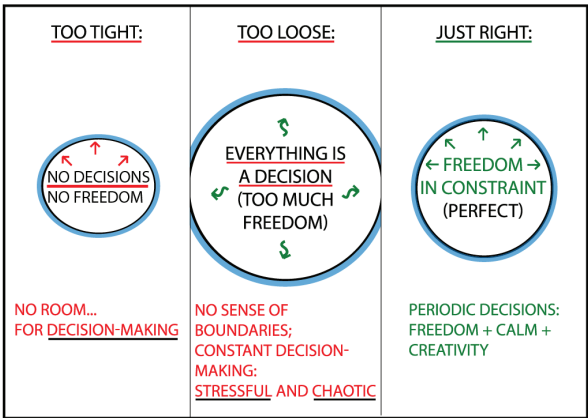
The Inviting Leadership approach is optimized on generating employee engagement in service to generating much higher levels of self-management. But it does not reduce leadership control,

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introduce chaos, or require you to “give it all away.” It does not make you or your role obsolete. On the contrary, it makes you and your role more important than ever. You are defining the total environment for work by clearly defining the boundaries of any invitation that you issue.

Bounded Containment

Inviting Leaders issue very clear invitations to engage. These invitations are highly structured with clear goals, clear rules, progress feedback, and opt-in participation. These invitations set very clear boundaries on what the receiver is being invited into. The rules aspect is where Inviting Leaders define the enabling constraints and make sure the authority being offered is clearly explained, and has very clear limits and boundaries.



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Boundaries in Three Sizes

These boundaries are designed to allow enough freedom for creativity and decision-making while also being constraining enough to define overall direction and focus the group.

When authority boundaries are too tight, no self-management can happen. When these same boundaries are too loose, there is too much freedom and there is potential for confusion or even chaos. The authority boundaries need to be just right.

Leadership Invitations

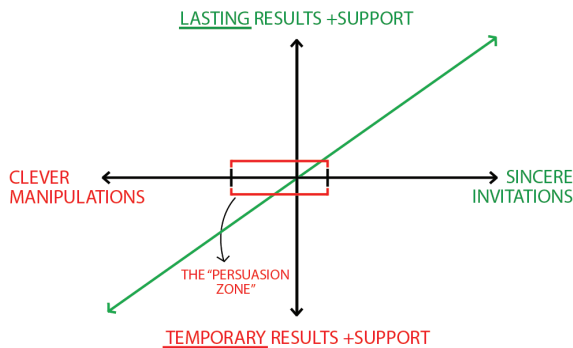
leadership invitation *n.*

An invitation issued by a formally authorized leader of the organization. It's not necessarily an invitation to lead in any way (although it could be).

If we can't "get" people to do what we want, we can't experience progress in our plans and (at least in theory) cannot experience more and more success "in the real world."

Now what is interesting about persuasion is the opt-in, volitional aspect of it. No one "makes" you be persuaded. You agree to be. You consent to be. You decide to be. You *opt in* to being persuaded, to "suspending your disbelief." You choose it.

Insincere or unscrupulous leadership invitations can and will backfire. *So be careful not to tilt into excessive levels of persuasion with your invitations.* Be sincere.



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Lasting vs Temporary Results and Support

If you want rapid and lasting support for your plans and leadership, you'll need to form coalitions with other like-minded

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leaders and followers. After you've done that, you'll need to define a clear and actionable strategy for enlisting as much employee support as possible. Leadership invitations can be used as part of that overall approach.

Sincere leadership invitations are superior when you want genuine and lasting support for your plans:

Sample Leadership Invitations

The *Inviting Leadership* book contains several examples of well-formed leadership invitations. These invitations have all the elements, especially very carefully defined rules and constraints. The constraints invite participation while at the same time defining limits and the overall invitation. Here is one example.

Invite Leadership Learning

Change in organizations requires alignment of the entire leadership team. A good way to begin achieving that is by scheduling a learning event for leadership team members, and making it plain that the event is optional. Such an event can help you gauge overall support for the change among leadership.

Here's how that invitation might go. You've arranged a learning event. It's three hours long. It includes a substantial amount of experiential learning with group exercises. Assume the nature of the change is a pivot towards business agility across an entire business unit and that you are leading this business unit:

Invitation: Business Agility

As part of our wider resolve to improve results, I have arranged for Mark Davis of Davis Research to come and provide an experiential leadership learning workshop in business agility. You are invited. The details are as follows:

Date and Time: March 18

Subject: Business Agility: what it means for our

organization

Agenda:

*0830AM Check in, coffee, continental
breakfast*

*0900AM Quick overview and group
exercise on business agility*

1000AM Break

*1015AM Whole group experiential
learning (exercises) in
business agility*

1215PM Formal check out

1230PM Done

*The facilitator Mark Davis has written several books
on business agility and is a noted authority in the field.*

*We are at a pivotal point in our development as
an organization. We face a range of challenges and
opportunities. The purpose of this learning event is to
address these challenges, orient the leadership team,
raise issues and questions, and prepare for our eventual
move to a business agility stance.*

*I've invited a cross-section of about 40 executives,
directors, and managers. If you know other executives,
directors, and managers who can benefit from learning
more about business agility, please feel free to invite
them (the room can handle 60++ people.) We will have
coffee, juice, and breakfast items available the whole
time.*

*This event is optional: if you have something else
going on that is important, go and do that instead.
However, we are purposely scheduling this over 1
month in advance, to make it easier for you to adjust
your schedule. I do need to know by March 16 (two
days before the event) to plan the beverages, food,*

and seating. Please RSVP by then if you intend to participate.

All the elements of a good invitation are present: clear goals and objectives, clear rules, an agenda that makes it easy to track progress, and opt-in participation. As you can see, leadership invitations need not be clinical or dry to be effective. The goals, rules, and progress tracking can be easily described in conversational language. It is much better to simply include clear goals, rules, and progress tracking rather than to label them. Simply make sure that all three elements are present in your invitation, and make sure the receiver understands there are no sanctions for opting out.

Leadership, Experience Design, and Leadership Invitations: Inviting Leadership as Game Design

As leader of a change initiative, you are designing the “total experience” for all the people in the enterprise. You are the highly authorized leader and you are in fact in charge of the majority of the experience design. You are authorizing almost everything regarding the experience of change. Take your responsibility for the overall experience design very seriously.

The primary thing to focus on is the enabling constraints: the rules and guardrails that you design into the overall experience. This kind of experience design is in fact *game design*. Since you plan to be issuing leadership invitations, you need to define the related boundaries, rules and guardrails carefully. Be very specific about what is invited, and the boundaries on that invitation. Your receivers will be paying very careful attention to these constraints as well. Engineer these enabling constraints very, very carefully: not too tight, and not too loose. Approach boundary and experience design as a leadership art.

Toolkit

Inviting Leaders are always issuing invitations to employees in pursuit of feedback. During organizational change, these leaders issue the invitations to help define how the change is implemented and to help in leading various aspects of the change. Most of the time, this means issuing invitations to whole-group meeting events or to events in which an appropriate subset of the group convenes to discuss, plan, and implement iterations of change. During these meetings, some of the participants do signal their strong willingness to help lead the change.

The *Inviting Leadership* book contains several effective tools for implementing Invitation-Based Change™. Two of these are Open Space Technology and OpenSpace Agility.

Open Space *n.*

A meeting format originally formulated by Harrison Owen as described in his book *Open Space Technology: A User's Guide*.

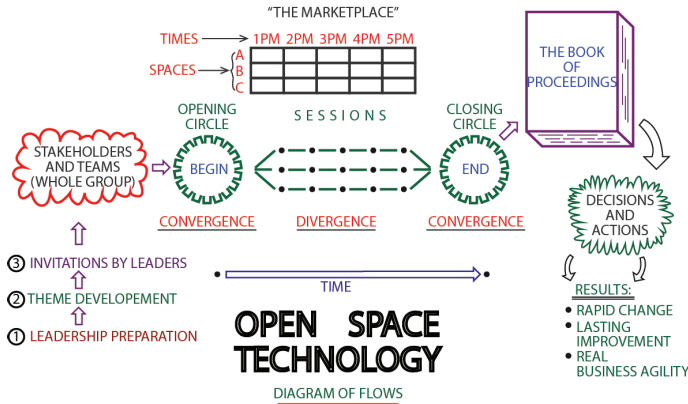
open space *n.*

A social situation that respects the freedom of participants to express what they want, think, and feel. Everyone in open space is aware that all topics of high interest to the members are open to discussion.

In an Open Space event, the participants self-organize around a compelling theme to solve the issues facing the organization. The event begins as the participants sit in a circle for a brief review of the theme and structure for the event. They create a marketplace of topics they want to discuss, along with a time and place for each session. Each participant is invited to propose one or more topics

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related to the theme. Then they go to work, participating in the sessions about which they feel passionate and responsible. This is the divergent middle of the event.



The Basic Flow of Open Space - Preparation to Proceedings

In each session the participants create artifacts that document the discussion and may include writing, photographs, etc. These artifacts are compiled into a Book of Proceedings, which is published and distributed to all participants. The Proceedings guide formal leaders in making decisions about what happens next.

The Open Space event ends with the participants reconvening into a circle for the closing where they reflect on what has just happened, what is about to happen (publication of the Proceedings followed by decisions and actions), and then declare the event over.

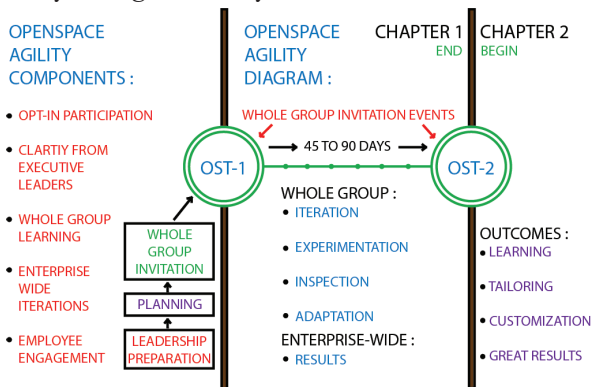
Open Space events do require preparation. The formal leaders need to be prepared to let the participants self-organize, discuss difficult issues, and come up with their own solutions. There must be a compelling theme that frames the event and is open-ended enough to encourage divergent thinking. There must be a genuine invitation from the leaders, explaining the purpose and value of the event and authorization for all invitees to decide whether to attend. And willingness to act on the Proceedings.

OpenSpace Agility

Employee engagement is absolutely essential for creating authentic and lasting organizational change. In 2015 Daniel, Mark, and co-authors published *The OpenSpace Agility Handbook*, defining an Engagement Model for digital and agile transformation for the first time.¹ In this model, each iteration of implementing enterprise-wide Agile change starts and ends with a whole-group Open Space meeting

OpenSpace Agility (OSA) is a tool that Inviting Leaders can use to initiate and trigger positive change in their organizations. It leverages these well-understood patterns that support rapid and lasting organizational change:

- Iteration, inspection and adaptation
- Invitation
- Ritual and the generation of “Common Knowledge”
- Self-management and self-organization
- Bounded containment and Enabling Constraints
- Psychological Safety



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OpenSpace Agility Overview

Here are some of the key features of OSA:

¹ For more information about invitational employee Engagement Models, see www.invitingleadership.com/book/links/#engagement-models.

Invitation: OSA is an invitational approach to evolutionary and incremental enterprise change. No one is compelled to attend the enterprise-wide OSA events.

Open Space: A “chapter” of learning in OSA is a 45 to 90 day period that begins and ends with an Open Space. These opt-in events can elicit very high levels of employee engagement.

Iteration: The 45-day to 90-day period represents an iteration of whole-group learning. The whole group engages in new ways of working, with intent to inspect and improve them as the group gains experience.

Experimentation: OSA is a kind of template for implementing safe, pragmatic, inspectable, whole-group iterations of learning and change. The whole group learns to try new things for a reasonable period of time, followed by a careful inspection process.

Rapid Adaptation: The intent of OSA is to help the whole enterprise learn to adapt. OSA achieves this by defining very clear time boundaries that create a clear story (an iteration) that has a beginning, a middle, and an end. OSA helps the whole organization learn how to adapt so that the next iteration can generate even more progress. This cycle is cumulative and creates the conditions for authentic, rapid, and lasting improvements.

Authentic and Lasting Results, Enterprise Wide: Organizations that rapidly adapt to changing conditions outperform those that do not. Once an organization learns how to learn, it creates an unbeatable advantage over competitors who do not.

OpenSpace Agility is being used worldwide in organizations of all sizes.

Next Steps

Now that you are familiar with the core components of Inviting Leadership:

- Authority
- Boundary
- Invitation
- Self-Management
- Leadership
- Leadership Invitations
- Toolkit

And you are familiar with the core principles of Inviting Leadership:

- Feedback is Essential
- Leaders are Designers
- Invitation Is An Ask
- Engagement Wins
- Systems Are Complex

We invite you to take the next step in your Inviting Leadership journey and contact us for more information about Inviting Leadership training, consulting, and the book.

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What happens next is up to you!

THIS GUIDE CONTAINS EXCERPTS
FROM

INVITING LEADERSHIP

INVITATION-BASED CHANGE™
IN THE NEW WORLD OF WORK

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INVITING LEADERSHIP

Rapidly accelerating change, driven by technology, is disrupting the world of work and redefining the game of leadership. Slow-moving, top-down, “command and control” leadership styles are less and less effective with each passing day. The successful leaders of today are finding ways to engage the entire workforce and focus the attention of the whole enterprise on higher performance. These leaders are pivoting their style from *delegation* to *invitation*.

INVITING LEADERSHIP is your tutorial and reference guide for implementing Invitation-Based Change™ in the new world of work. This book shows you how to leverage genuine invitation to engage the workforce and generate the positive business outcomes that emerge from self-managed teams. INVITING LEADERSHIP shows you how to do more with less.

WITH THIS BOOK, YOU WILL LEARN HOW TO SAFELY AND PRAGMATICALLY TRANSFORM YOUR LEADERSHIP STYLE AND MAXIMIZE YOUR RESULTS.

- Greatly increase employee engagement
- Improve overall business efficiency with self-managed teams
- Attract and retain top talent
- Achieve higher scores in every business outcome you are measuring
- Help your entire organization become more competitive and adaptive
- Build a genuine and lasting environment of continuous improvement
- Scale these business outcomes across the entire enterprise

**INVITING LEADERSHIP is your
road map for achieving
authentic and lasting
Business Agility.**