


Managing in Fluid Environments

presented to



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by
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Building State-of-the-Art Teamwork
In Problem-Solving Organizations




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A note on format



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- Underlined items are live links to:
 - Other slides
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Please let me know as we go along
if you want to ask a question

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Core message

- Fluidity describes the relationship between:
 - The pace of change
 - Our ability to deal with it
- To succeed in fluid environments we must:
 - Understand how change affects people and systems
 - Understand our environments
 - Anticipate what will happen next
 - Prepare for the most likely scenarios
 - Be able to adapt rapidly

Managing successfully in fluid environments
requires situational awareness and agility

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What's a fluid environment?

- A fluid environment is subject to continual change (punctuated stasis)
- The changes are
 - Predictable in the large
 - Unpredictable in details of what, when, or how much
 - "Close" to what's happening now
- Impact is also unpredictable
- Predictability depends on
 - Your own awareness of the situation
 - Your experience



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Where the problems come from

- Definition of success: how well we meet projections
- Success depends on:
 - Careful planning
 - Managing risks
 - Intervening in a timely, appropriate way
- In fluid environments:
 - Knowledge of coming changes is approximate
 - Not accurate enough to meet conventional standards of success
 - Conventional means of adapting are too slow

Using conventional methods, our ability to predict change isn't good enough to "keep to plan"

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Change and fluidity

- In conventional environments
 - The interval between changes is much longer than the time required to adapt
 - We can accommodate changes using change management methodologies
- In fluid environments
 - The interval between changes is shorter than the time required to adapt
 - Conventional change management methodologies are inadequate

In fluid environments, the next change arrives before we finish dealing with the latest one

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Three keys to dealing better with change

1. [Anticipate change](#)
2. [Adapt quickly](#)
3. [Make resilient plans](#)

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1. Anticipate change

- Anticipating change effectively requires enhanced situational awareness
- Many ways to accomplish this
 - [Google alerts](#)
 - [Automated database queries](#)
 - [Temperature reading](#)
 - [What Haven't I Told You?](#)
 - [Brilliant questions](#)
 - [Your network](#)

If you don't know where you stand, you probably won't be standing for long

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Use Google alerts

- Set [Google alerts](#) for items you want to know about
- Google sends you email with links to pages matching the alert pattern
- Examples:
 - "<disasters> <site names>"
 - Obituaries, police reports, etc., of family members of key people
 - Names of outsource service providers and supply chain companies
 - Names of players in internal politics



Vervet Monkey (Tanzania)

[Listen](#)

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Share Google alerts

- Some alerts can be useful to multiple projects
 - Shared vendors
 - Concern about disasters at the same locations
 - Concern about the same key people
- To share an alert, create a Google account for a mailing list
 - Invent a pseudo-person
 - Make their email address the distribution list of people who want to subscribe to the alert
- Create packages of alerts by creating packages of alert subscribers

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Automate database queries

- Project management databases contain:
 - Reported hours
 - Project status
 - Approved scheduled vacation
 - Much more
- Create software agents to:
 - Monitor these databases
 - Compare to your plan
 - Send you alerts

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A game: What Haven't I Told You

- Catastrophes happen
- Sometimes they were avoidable
- Often the information we needed was already known to some
- The people who had it thought everyone knew
- "What Haven't I Told You" is a structured process for surfacing critical information



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How to play
What Haven't I Told You

- 10-15 people, plus facilitator
- Like brainstorming
- Instead of new ideas, try to think of things that:
 - Are generally understandable
 - Haven't been generally discussed
 - Many people know
 - At least a few people don't know
- Search for items that if withheld could ruin the effort

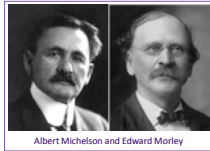
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Ask brilliant questions

- What brilliant questions do:
 - They halt the conversation, open new vistas
 - They can save weeks, months or years of wasted effort
- Groups sometimes reject brilliant questions—they threaten the status quo
- Educate the group to appreciate them

Example of a BQ: Why don't we get more brilliant questions?

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How to generate brilliant questions

- Tactics:
 - Identify assumptions
 - Relax assumptions to open your mind
 - Question the facts: "How do we know that's true?"
 - Distinguish facts from explanations of facts
 - Play "as if": "If we could do that, how would we?"
- Example templates:
 - Why are we ignoring the parts of the problem space that we're ignoring?
 - Flag single-concept answers—there is no silver bullet
 - Decouple causes and effects—what if this effect isn't caused by those causes?

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Strategies for increasing the frequency of brilliant questions

- Collect techniques for generating brilliant questions
 - When you see examples
 - By reaching out to brilliant questioners
- If you have people who regularly ask brilliant questions
 - Give recognition for their contributions
 - Try to transfer their skill to more people
- Include an inventory of BQs during retrospectives

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Your network: Maintain your network

- Your network is the set of people you know who:
 - Exchange political information with you
 - Might or might not be fellow employees
- "Touch" everyone at least once every 60 days
- A touch is
 - Email phone, coffee, office visit, lunch, ...
 - Delivery of some bit of political content

If someone hears from you only when you want some info, don't rely on what you get

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Your network: Tips for alliances

- Alliances are based on trust that transcends organizational affiliation
- They serve a function analogous to family or tribe
- But political alliances aren't families or tribes
- To form alliances
 - Trust and be trusted
 - Deliver value
 - Be prepared for rupture and reconfiguration



Stalin, Roosevelt and Churchill on the portico of the Soviet Embassy at the Teheran Conference, 1943

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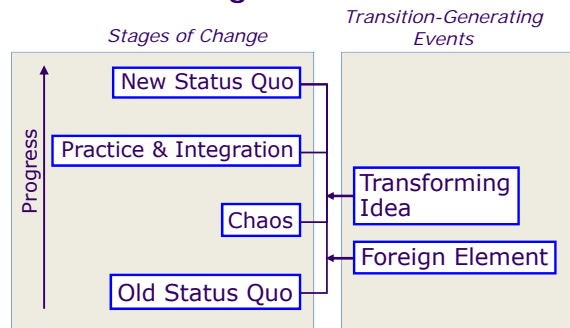
2. Adapt quickly

- Two essential models of change
- Satir's Change Model
 - Developed by Virginia Satir, family therapist
 - Models how people/groups respond to change
- Boyd's OODA Model
 - Developed by Col. John Boyd, USAF fighter pilot
 - Models combat situations and processes
- Satir emphasizes internals and psychology
- OODA emphasizes interactions between people and systems

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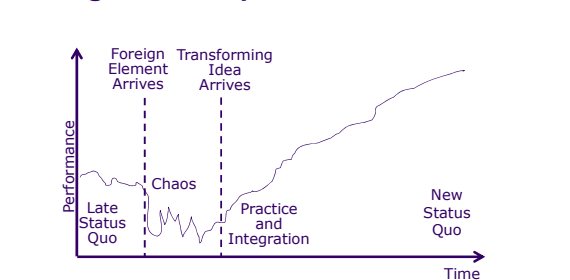
The Satir Change Model



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Change affects performance



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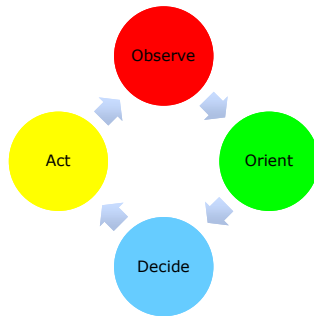
How to deal with Chaos

- Accept that Chaos is here
- Do what you can to continue production
 - Some people just can't do it
 - Some people can't keep from doing it
- Make no important decisions
- The main job: hunting for the Transforming Idea
- Common mistakes
 - Adhering to Late Status Quo
 - Rejecting the Foreign Element

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Boyd's OODA model



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The OODA model in brief

- Observe
 - Sense the environment
 - Example: Management learns of a hostile takeover attempt
- Orient
 - We synthesize what we've observed
 - Example: Management researches the offer and available defenses
- Decide
 - We select a response
 - Example: Management decides to approach a competitor about a merger
- Act
 - We execute our decision
 - Example: Management agrees to merge



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Use OODA to guide your thinking

- For success in rapidly changing situations: Cycle through your OODA Loop fast enough
- When your opponent—or the situation—changes too fast, failure is almost certain
- If you have sentient opponents: Cycle through your OODA Loop faster than your opponents cycle through theirs

For examples of strategic use of OODA, study national political campaigns

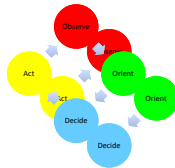


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Effects of situational complexity

- "Situation" might not be unitary
 - At any one time, several interlocking situations can be unfolding
 - The OODA loop for one might tangle with the OODA loop for another
- Example: dealing with a project issue might involve personnel issues
- Do what you can to factorize problems
- Arrange to let them unfold independently



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Effects of virtuality on decision-making

- In virtual contexts:
 - Simultaneity can get skewed
 - One site might have knowledge another doesn't
 - OODA loop can become phase-distorted
 - OODA loop cycle times are longer
- How to address this:
 - Include phase distortion management in risk plan
 - Allow budget and schedule for it



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How to reduce OODA cycle time

- Enhance situational awareness
- Prepare situation-specific plans
- Use multi-threaded planning
- Prepare stage-specific assets
- Train, train, train

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3. Make resilient plans

- Resilience: a system's capacity to adapt to disturbance
- Create resilient plans that incorporate:
 - Organizational learning
 - Intelligence gathering
 - [Situation-specific routines](#)
 - [Multiple threads](#)
- Reduce vulnerability to interacting change events
- Reduce vulnerability to interacting risks
- Train and drill in advance of the event
- Respect (and pay for) [team integrity](#)

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Examples of situation-specific plans

- Adding a person to the team
- Running a teleconference
- Responding effectively when:
 - A key team member doesn't show up at a meeting
 - Three people are laid off
 - A subcontractor is non-performing in Pattern X, Y, Z, ...
 - Three elevators are off line
 - IT decides to upgrade MS Office

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Use multi-threaded planning and execution

- Multi-threaded planning and execution:
 - Two (or more) simultaneous paths to the same goal
 - If one fails, the others continue
- Single-threaded plans are vulnerable to delays
- Multi-threaded plans keep alternatives "hot"
- Multi-threaded plans are often wrongly seen as wasteful
- Computation of "waste" usually excludes:
 - Cost of delays in time to market
 - Benefits of discoveries resulting from independent development

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Respect team integrity

- Currently, in most organizations:
 - "Lean and mean" dominates
 - Most people belong to multiple teams
 - People are cycled in and out according to "need"
 - This is the result of a shallow bench
 - Team integrity, esprit de corps suffer
 - Penny wise, pound foolish
- Respecting team integrity:
 - Costs the project more
 - Elevates morale
 - Makes team more adaptable and resilient
 - Saves the company money

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How to introduce plan resilience in your organization

- Unless you're the CEO, there's no short-term fix
- In risk plans, note the costs of:
 - Assuming all change events are non-interacting
 - Not having a training and drill program for contingencies
 - Using single-threaded plans
 - Violating team integrity
- In retrospectives call attention to these same issues
- Incorporate these observations in lessons-learned documents

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Last words

- Be surprised by fewer of the events that do surprise others
- Create plans that prescribe responses to change events
- Reduce the number of change events we impose on ourselves
- Create plans that survive change events
- Create teams that are better able to adapt

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Relevant publications

- “Managing in Fluid Environments”
 - *Better Software*, September 2011
 - Deals with adapting to change more rapidly
- “Leading in the Time of Data Breaches”
 - *Cutter IT Journal*, August, 2014
 - Deals with decision-making in cyber security
 - Download a free copy at: <http://c4i.co/wf>
- “Creating High-Performance Virtual Teams”
 - *Cutter IT Journal*, May 2013
 - Fourteen recommendations for enhancing performance of virtual teams
 - Download a free copy at: <http://c4i.co/wg>

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Resources

- Politics, meetings, communication, and conflict
 - Articles at <http://ChacoCanyon.com/pointlookout/politics.shtml>
 - Tips ebook *303 Secrets of Workplace Politics*:
Acrobat: <http://c4i.co/5d>
iTunes iBook: <http://c4i.co/we>
 - Articles at <http://ChacoCanyon.com/pointlookout/communication.shtml>
 - Tips ebook *101 Tips for Communication in Emergencies* at <http://ChacoCanyon.com/products/techdivide.shtml>
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