

Brian Robertson Interview Notes (with Dave Graffy)

[Brian is the CEO and founder of Holacracy. Can you give us a frame about what is Holacracy and how we can bring your philosophy and practices into our own workplaces?]

- The metaphor in use is that Holacracy is an operating system for organizations. Your computer's operating system controls practically everything that happens; the way the power is distributed, the way applications work together and share resources, the way they collaborate. It's the underlying system and structure everything else is built on top of.*
- Our organizations today also have an operating system beneath them; one we often don't think much about. But if you do think about it, the way we organize, the way power flows, decisions work, the structure of the organization, all emerged about the middle of the last century in its current form. That's actually quite old for an operating system, and we say Holacracy is an upgrade to that operating system. A new way of distributing power, making decisions, working together around the common purpose. It comes from different*

principles and paradigms than the current way we're used to organizing.

[How does this operating system incorporate integral thinking or appeal to business leaders?]

- Leaders who are able to make a developmental leap and see things from a new perspective, cultivating a deeper capacity for conscious response to the world, find it's very difficult to sustain that shift in perspective when they go back into the conventional organizations they work in. All the structures in the organization that held them where they were are still operating, even when they as leaders gain new capacities.*
- What Holacracy does is change that fundamental structuring system to better hold and express those new capacities. Even when you don't have people in the organization with those new capacities, the system and structure can still hold it, to some degree. And when you do have people in the organization with those capacities, it frees them to go back into the system and deeply nourish and harness those new capacities.*
- Suzanne Cook-Greuter said about Holacracy: here's a system that takes capacities typically only available in*

very late stages in human development, and it builds them in to the operating system of the company itself, so the whole system evokes and expresses those capacities.

- *It makes attempting to change an organization solely through leadership development both less necessary, because it's not your only lever for change, and more impactful because when you succeed at catalyzing developmental capacities, they're working in a system that supports and expresses those capacities better.*

[Can give us an example?]

- *I'll talk about one of the principles: Dynamic Steering. Imagine if we rode a bicycle like we manage a modern company today. It would look something like this:*
- *We'd have committee meetings to plan and analyze how we should ride the bicycle; to predict all the ways we'd need to steer it, to get the ride to go according to our plan.*
- *We'd finally get on the bicycle, hold the handlebars rigidly at the angle we'd calculated. We'd close our eyes and pedal. If the bicycle fell over somewhere along the journey, we'd get up and say, "why didn't we get this*

right the first time? What went wrong? Who's to blame for this (so we can fire them), we know what to do next time... we obviously need more up-front prediction, more control, more top-down management to lock in according to plan."

- *At the core of Hologracy is a paradigm shift from that mode of "predict-and-control" management to something much more of what actually happens when you ride a bicycle. It's not a process of predicting in advance, then controlling to unfold according to plan. This is fighting reality, and gives a comfortable illusion of control.*
- *When you actually ride a bicycle, you get more real control by staying present in the moment, and flowing with reality, responding to it at every moment. Steering is not something you do once, up front. It's something you do every moment in the journey with your eyes wide open. You're taking in data and adapting continually, dynamically steering.*
- *It's that paradigm shift that infuses this new method of organization. This takes consciousness to the organizational level... an organizational capacity to sense anything in its reality and respond to it in the moment, in the flow.*

- *How many organizations do you know of that can genuinely say that anything sensed by anyone, anywhere in the company has a place to go to get consciously processed and responded to, quickly and rapidly? Very few. Most companies don't have that level of conscious response capacity to their reality. Most are trying to fight and resist reality with predict-and-control management.*

[How do you create an opening in the people in these organizations that are deeply entrenched in these predict-and-control ways of thinking and organizing?]

- *All that's needed is to try this new way. The experience will speak for itself. All we tell them is, try it out, you can always go back to the old way tomorrow if this doesn't work. The experience of it sells it.*
- *Dynamic steering is still about control; it's just about getting there very differently. It's not about our own personal, egoic control of the company the way we think it should be controlled. It's about surrendering to the natural flow of reality and gaining more "real" control and less "illusory" control. Once that's experienced, folks that want control will feel it, but*

coming from a very different source; maximizing their ability to consciously process and respond to it. Once you taste that, it's difficult to go back to the illusory control...

[We all pretend together <laughter>... Is it your sense that the top leader must be strongly oriented to second-tier thinking, or does that not matter?]

- Much less so. The system holds the capacity itself, to a large degree. There is a need for the top leader to have at least some buy-in to try this out. It could come from their own developmental capacity, or it could come from a practical sense of needing their organization to be more responsive to the market.*
- Or in one case we had, the owners wanted to sell their company, and they knew to do that, they needed to unfuse it from themselves as founders, and create an organizational system that would function without them (or nobody would buy the company). In their case the motivation included not wanting to lose their entrepreneurial agility as they adopted more formal controls and systems.*

- *One of the ironies is this, in many ways, distributes leadership. Once you've adopted this, it's less important for the top leader to have complete awareness. Holocracy is a distributed leadership system; leadership shows up throughout the entire organization, using each person to the best of their capacity to show up, sense, and process reality.*

[What are some thoughts on how to share this experience with conference participants?]

- *I'd like to first offer an overview; a tour of what the system is, more concretely. Then go into some of the core principles, then move into the organizational structure; it's more organic, thus very different than what we're used to. What are the different meeting and decision-making processes that guarantee everyone has a voice, yet avoid the tyranny of consensus.*

[You use the word "governance"... how does Holacracy see that?]

- *Governance is about how we work together. Typically there's some tension in organizations around how things work. Mostly there's not much you can do when you sense some friction for frustration around how we*

work together. One of the goals of Holacracy is to provide governance processes that evolve how we work together, so anyone in the company that senses tension or an opportunity to work together more effectively has a place to go to get that processed into meaningful change in the organization. Governance isn't top-down like it is in most organizations. In Holacracy, every team in the company has a governance process to evolve with real learning about how we've worked together, integrate that learning and evolve how we work together; who has what authority, etc.

[It's got real engagement, not just following a process. The system encourages participation, something I struggle with in my organization, particularly with front line staff... to really show up with their gifts and talents and recognize that work offers a lot more than just a paycheck, if they can just show up.]

- It's no wonder we have those issues, when our current structures don't allow these kinds of issues and tensions to be dealt with effectively. It's difficult to have a voice in our conventional structures. As soon as you give them a system that gives them a real meaningful voice and impact, the engagement is naturally evoked.*

- *Our current structures are based on the paradigm of the heroic leader, the parental company, and the child employee. No matter how much we don't want that, the system pushes toward it. Holacracy has a different paradigm. It breaks that parent-child relationship, and invites everyone to find their power, their voice, their intrinsic motivation, and show up fully and authentically to contribute to something larger than themselves.*
- *That's both a burden to rise up to, and a deep opportunity when people are ready to step up and take it. It says, no one here is going to come in and save and lead you. You're in charge of leading yourself, of processing your own tensions in service to this purpose. Here's a system, structure and process to hold that, and make sure you do it in alignment with everyone else.*

Brian Robertson

Brian Robertson is an experienced entrepreneur, CEO, and organizational pioneer. He is most well-known for his work developing Holacracy™, an organizational operating system that concretely embodies the new capacities called for by many organizational thought-leaders today.

Brian's initial work with Holacracy™ took place at an award-winning fast-growth software company he founded and led for seven years. The system he initially developed there has continued to evolve and spread in the years since under the stewardship of HolacracyOne, an organization Mr. Robertson co-founded to further develop the method and bring it to the world.



Brian currently works with HolacracyOne to help consultants and change agents bring its evolutionary approach to organizations across the globe.

David Graffy

David Graffy is the President of ProLift Industrial Equipment, a material handling equipment distributor. ProLift is headquartered in Louisville, Kentucky, with customer support centers located in Indianapolis, Cincinnati, Dayton, Evansville, Lexington and West Virginia. ProLift employs 300 people, of which nearly one-third are technicians. ProLift has earned Toyota's prestigious President's Award for seventeen out of the twenty one years it has been awarded. David was one of six owners of ProLift until 2007, when Toyota purchased the company.



Before transitioning into the material handling field, David spent six years with Ernst and Young, several years with a non-profit child welfare agency and was a principal with a computer software firm. He has served in a multitude of capacities throughout his career, including general manager, vice president of operations, vice president and president.

While his life's work has been running businesses, his underlying interest and motivation is in developing people and systems (i.e., organization culture). David's sense is that we are not who we appear to be and uses the business environment to encourage people to look a bit deeper and build structures to help support individual and collective growth.

David earned his Master's Degree in Organizational Development from Case Western Reserve University in Cleveland, Ohio and his Bachelor's Degree in Business from John Carroll University also in Cleveland. He is a student and practitioner of integral theory and integral leadership.