

Sustainable Agility – Can we have Team Health without Individual Health?



Presentation to:
Agile Alliance 2023

7-24-2023

Your presenter today: Leor Herzfeld



- Ⓐ I have been practicing Agile since 2008 and has worked across all levels of large-scale Agile transformations with a focus on organizational design and culture change.
- Ⓐ I believe that connecting people's individual purpose with the needs and objectives of the organization at large is a key factor in enabling sustainable transformation.



Agenda

- ⌕ Problem statement & Ice breaker
- ⌕ Integral Theory - What is Holonic Health, and why does it matter?
- ⌕ What do people need to be happy and healthy at work?
- ⌕ Understanding the journey – Shu, Ha, Ri
- ⌕ Exercise - Assessment
- ⌕ How to create a complete solution in a way that will be sustainable
- ⌕ Exercise – Going deeper
- ⌕ Discussion – Putting it all together
- ⌕ How can you use this tool with your teams?
- ⌕ Next steps & Q&A



Are things getting worse, or are people only now becoming aware of the pain they have been living with?

EMPLOYEE ENGAGEMENT

Based on Gallup Q¹² items; see "Appendix 3: Support Information" for item wording

THRIVING AT WORK

% Engaged

Regional

31% -2

Global

23% +2



QUIET QUITTING

% Not engaged

Regional

52% +1

Global

59% -1



LOUD QUITTING

% Actively disengaged

Regional

17% +2

Global

18% -1



Source: State of the Global Workplace 2023 Report

THE VOICE OF THE WORLD'S EMPLOYEES

Over half of us experience stress on a regular basis

DAILY STRESS

Did you experience the following feelings A LOT OF THE DAY yesterday? How about stress?

% YES

Regional

52% +2

Global

44% 0



[▶ Compare countries](#)

Gender

57%
Female

48%
Male

Job Level

56%
Manager

51%
Individual contributor

Age

59%
<40 years old

46%
≥40 years old

Work Location

53%
Exclusively remote

55%
Hybrid

53%
On-site



Source: State of the Global Workplace 2023 Report

THE VOICE OF THE WORLD'S EMPLOYEES

Could this explain the rise in public rage-quitting we have been seeing?

DAILY ANGER

Did you experience the following feelings A LOT OF THE DAY yesterday? How about anger?

% YES

Regional

18%

Global

21%



 [Compare countries](#)

Gender

18% 
Female

18% 
Male

Age

20% 
<40 years old

16% 
≥40 years old

Job Level

18% 
Manager

18% 
Individual contributor

Work Location

15% 
Exclusively remote

16% 
Hybrid

18% 
On-site



Source: State of the Global Workplace 2023 Report

THE VOICE OF THE WORLD'S EMPLOYEES

About half of us want to leave our jobs... if this is true, is the grass really greener elsewhere?

INTENT TO LEAVE

To what extent are you currently looking for a different job than the one you have now? Are you actively looking for another job, watching for opportunities but not actively looking, or are you not looking for another job?

% WATCHING FOR OR ACTIVELY SEEKING NEW JOB

Regional

47%

Global
51%



Gender



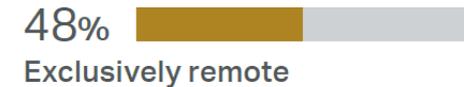
Job Level



Age



Work Location



Source: State of the Global Workplace 2023 Report

THE VOICE OF THE WORLD'S EMPLOYEES

ICEBREAKER: How is this affecting you?

Form groups of up to 4, and discuss if and how this is affecting you in your organization





How Can Integral Theory Help?

What is Integral Theory?

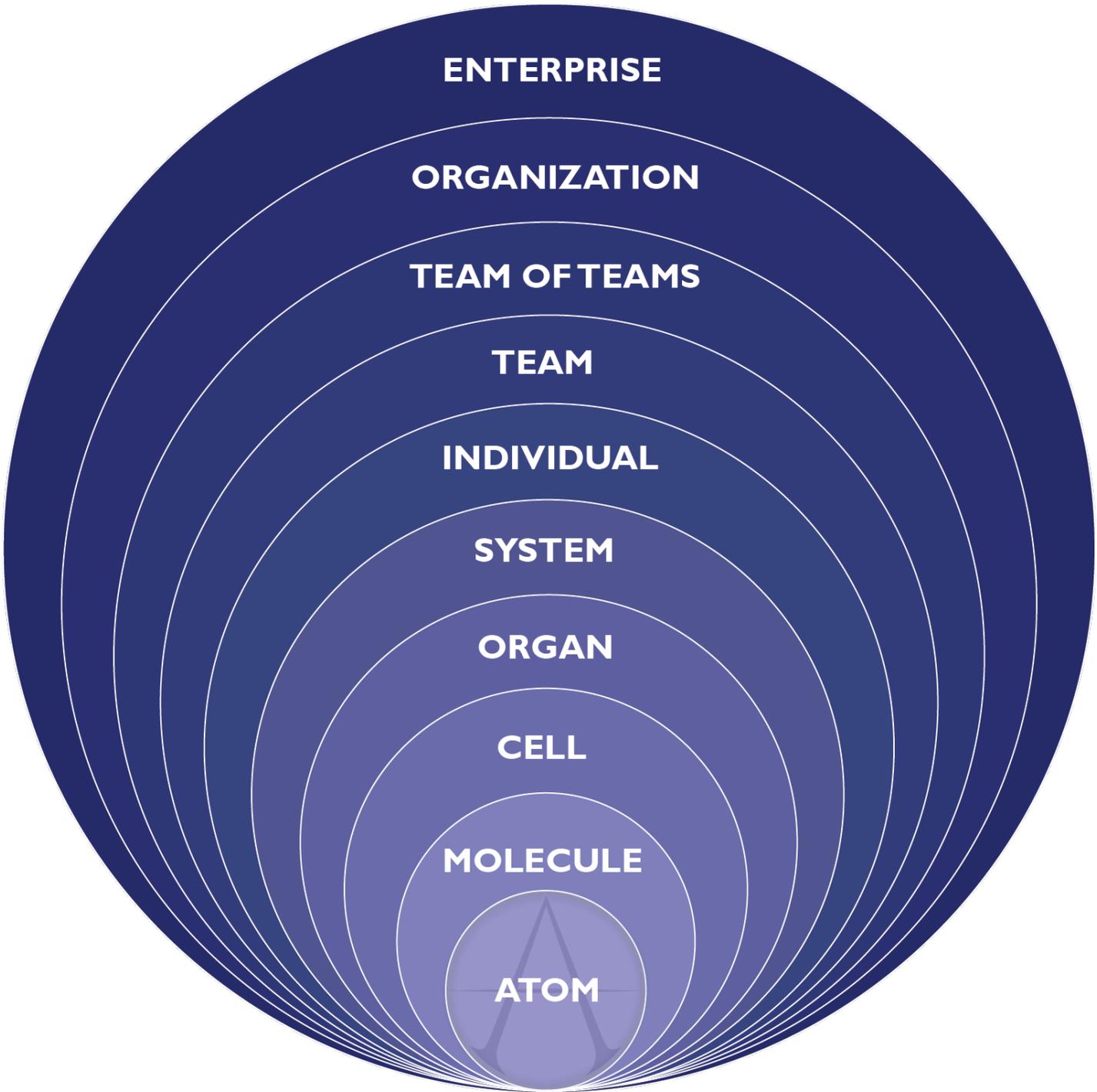
- ⊕ During the last 40 years, we have witnessed a historical first: all of the world's cultures are now available to us.
- ⊕ Knowledge itself is now global.
- ⊕ What if we took literally everything that all the various cultures of the world have to tell us about human potential and put it on the table?
- ⊕ Sound complicated, complex, daunting?

WELCOME TO THE INTEGRAL APPROACH

- Ken Wilber



What are Holons?



What does an individual need to be healthy?

① 1





12 Dimensions of Individual Health

12 Dimensions of Individual Health

SAFETY

AUTONOMY

MASTERY

PURPOSE

PERSONAL GROWTH

CAREER GROWTH

PLAY

HEALTHY RELATIONSHIPS

ACCOUNTABILITY

MENTORING

ACHIEVEMENT

PHYSICAL HEALTH



“Control leads to compliance; autonomy leads to engagement.” - Daniel H. Pink

SAFETY

AUTONOMY

MASTERY

PURPOSE

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CAREER GROWTH

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ACCOUNTABILITY

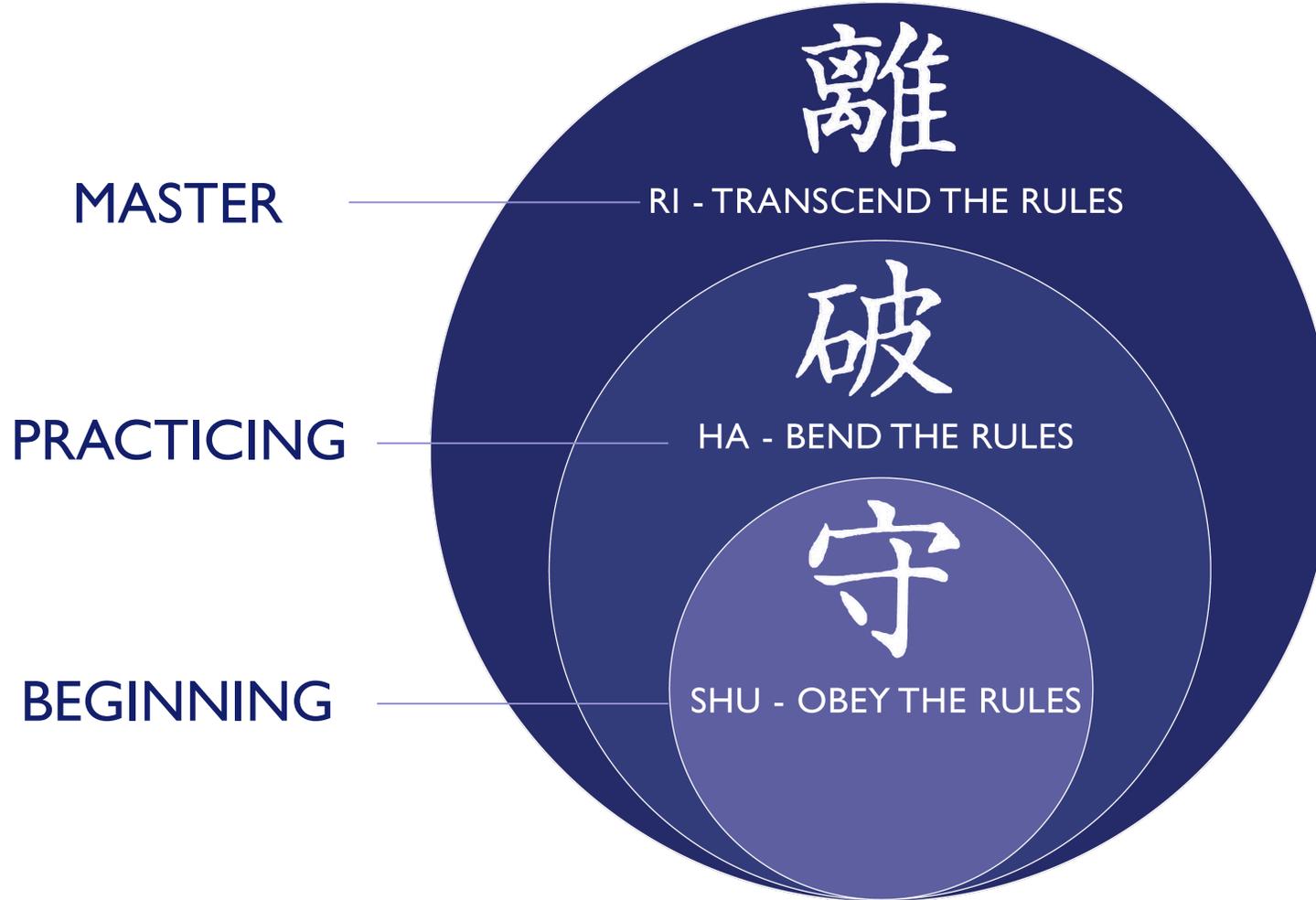
MENTORING

ACHIEVEMENT

PHYSICAL HEALTH



Health, like everything else in the world, is a Journey



Exercise: AUTONOMY

- 1) I'm often told what my next task will be
- 2) I feel like I can choose my next task without having to ask for permission
- 3) I feel empowered to act, and responsible for the results
- 4) I am usually aware of how to use my time to deliver maximum value/impact.

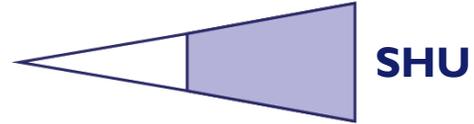


Exercise: AUTONOMY – How does this map to the journey?

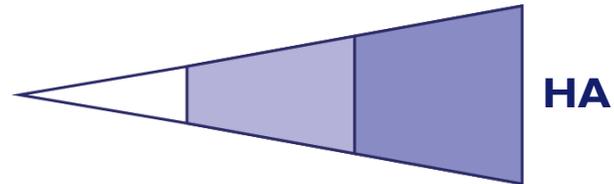
1) I'm often told what my next task will be



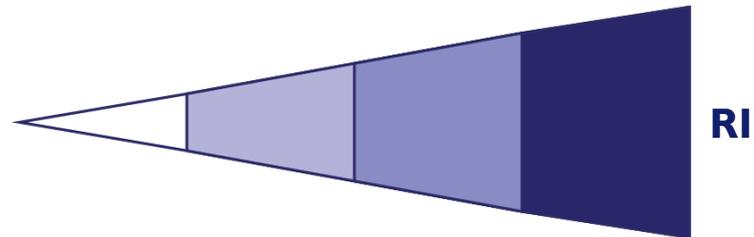
2) I feel like I can choose my next task without having to ask for permission



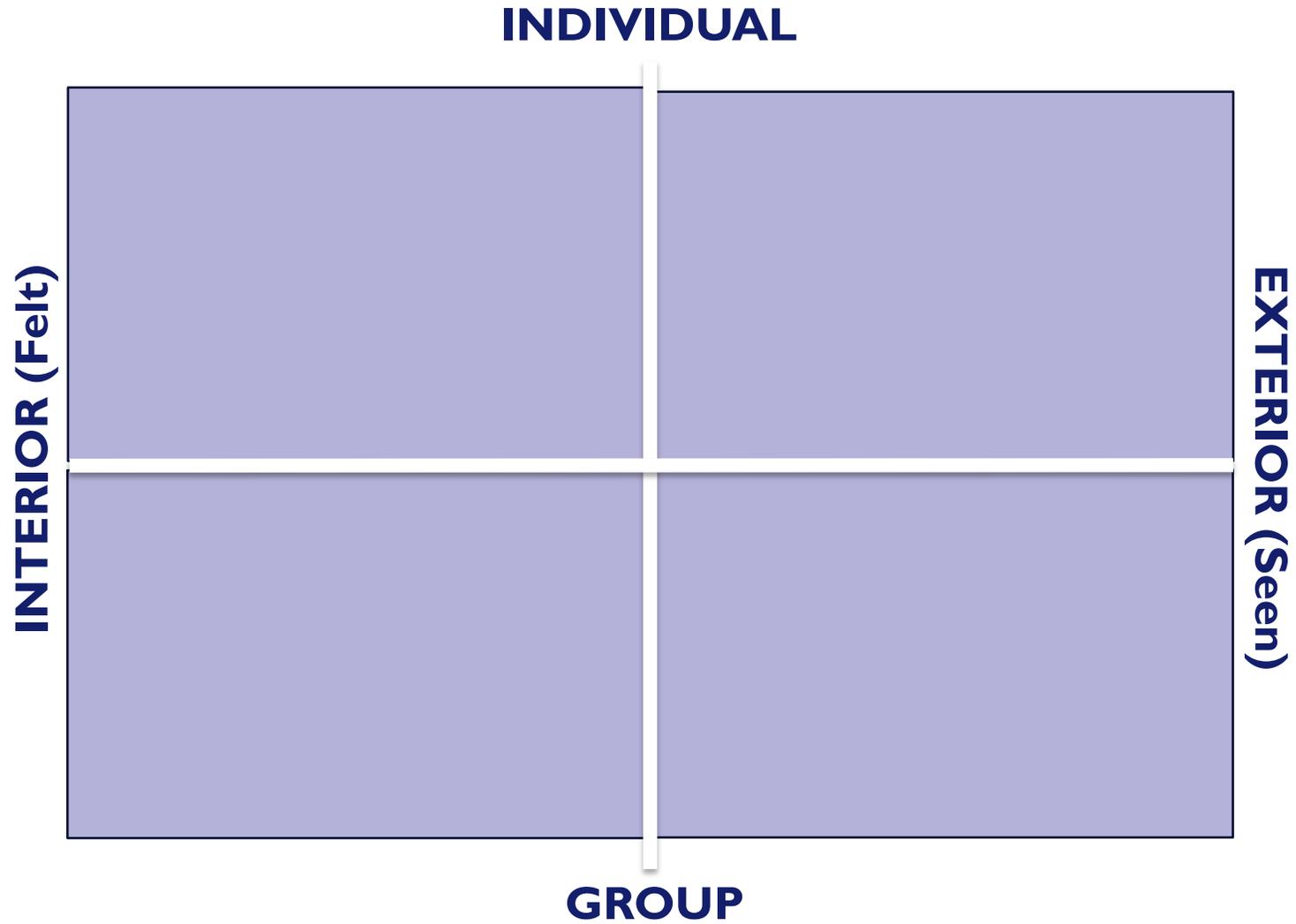
3) I feel empowered to act, and responsible for the results



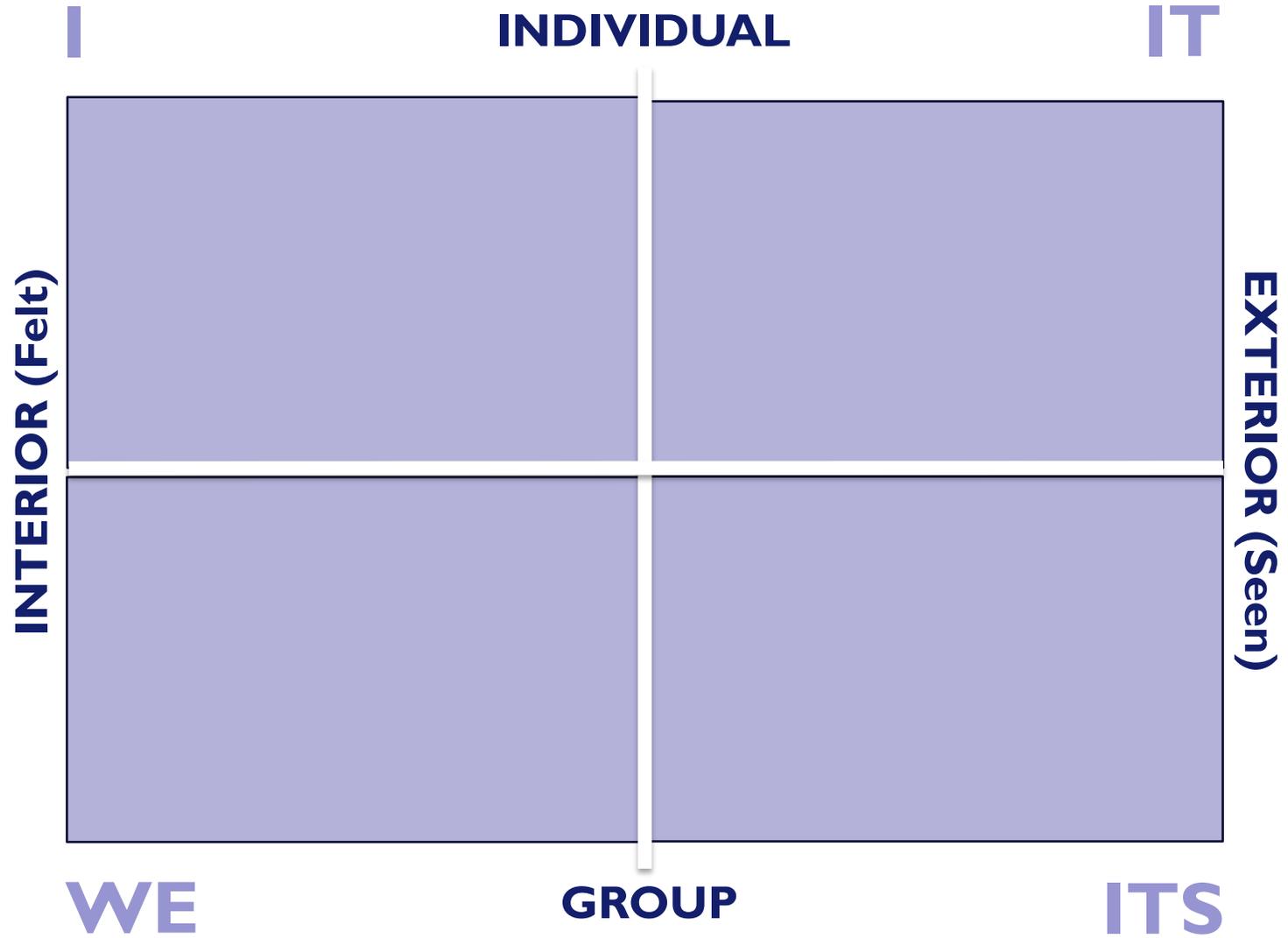
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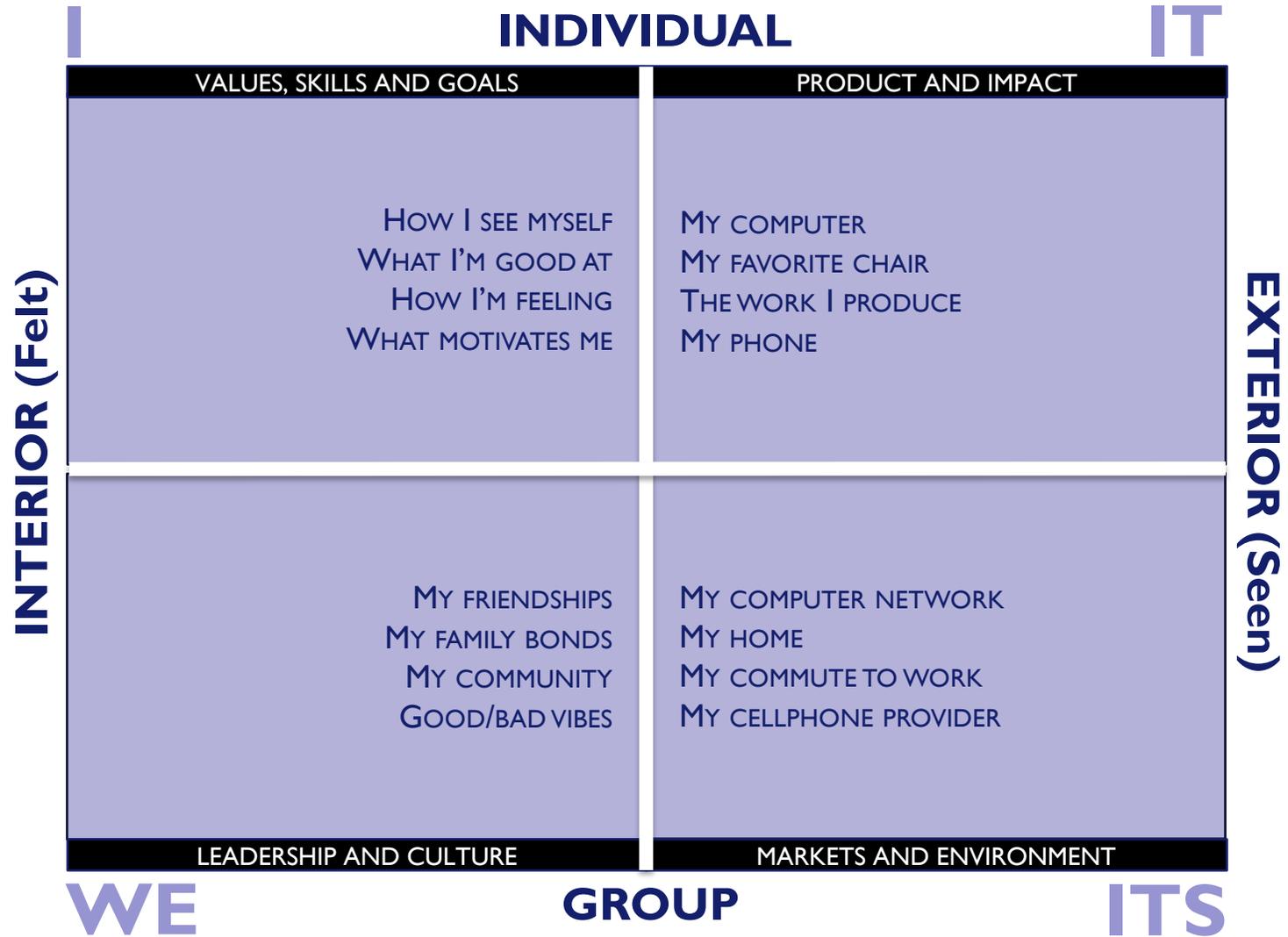
The Four Quadrants – The 4 different perspectives in which reality takes place

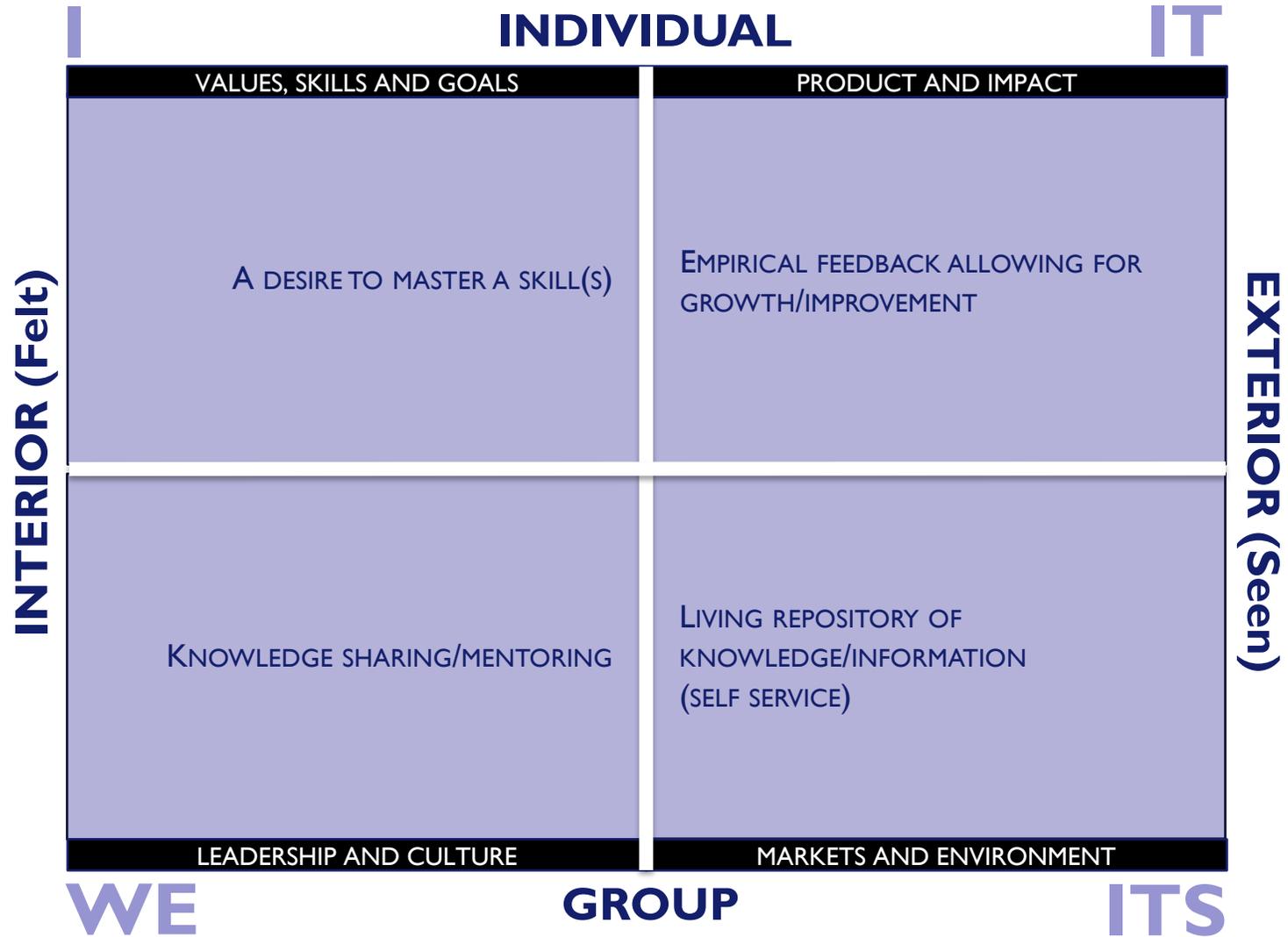


The Four Quadrants – The 4 different perspectives in which reality takes place



How do the Four Quadrants apply to your life?





Let's combine these ideas: The PURPOSE Journey overlaid into the Quadrants

UNAWARE: I'm not aware of what the current goals are.

SHU – BEGINNER: I'm aware of the overall goal, but not sure how my contribution helps us get there.

HA – I'm aware of my purpose in the world and how I can best contribute to my team's overall goals.

VALUES, SKILLS AND GOALS	PRODUCT AND IMPACT	
Aware of the current goal	Picks up next high priority item	SHU
Awareness of their own life's purpose	Rapid decision making based on purpose	HA
Aware of organizational purpose	Processes allow for personal expression in the service of organizational goals	HA
Aware of team vision	Environment optimized to enable organizational purpose	SHU
LEADERSHIP AND CULTURE	MARKETS AND ENVIRONMENT	



Let's combine these ideas: The PURPOSE Journey overlaid into the Quadrants

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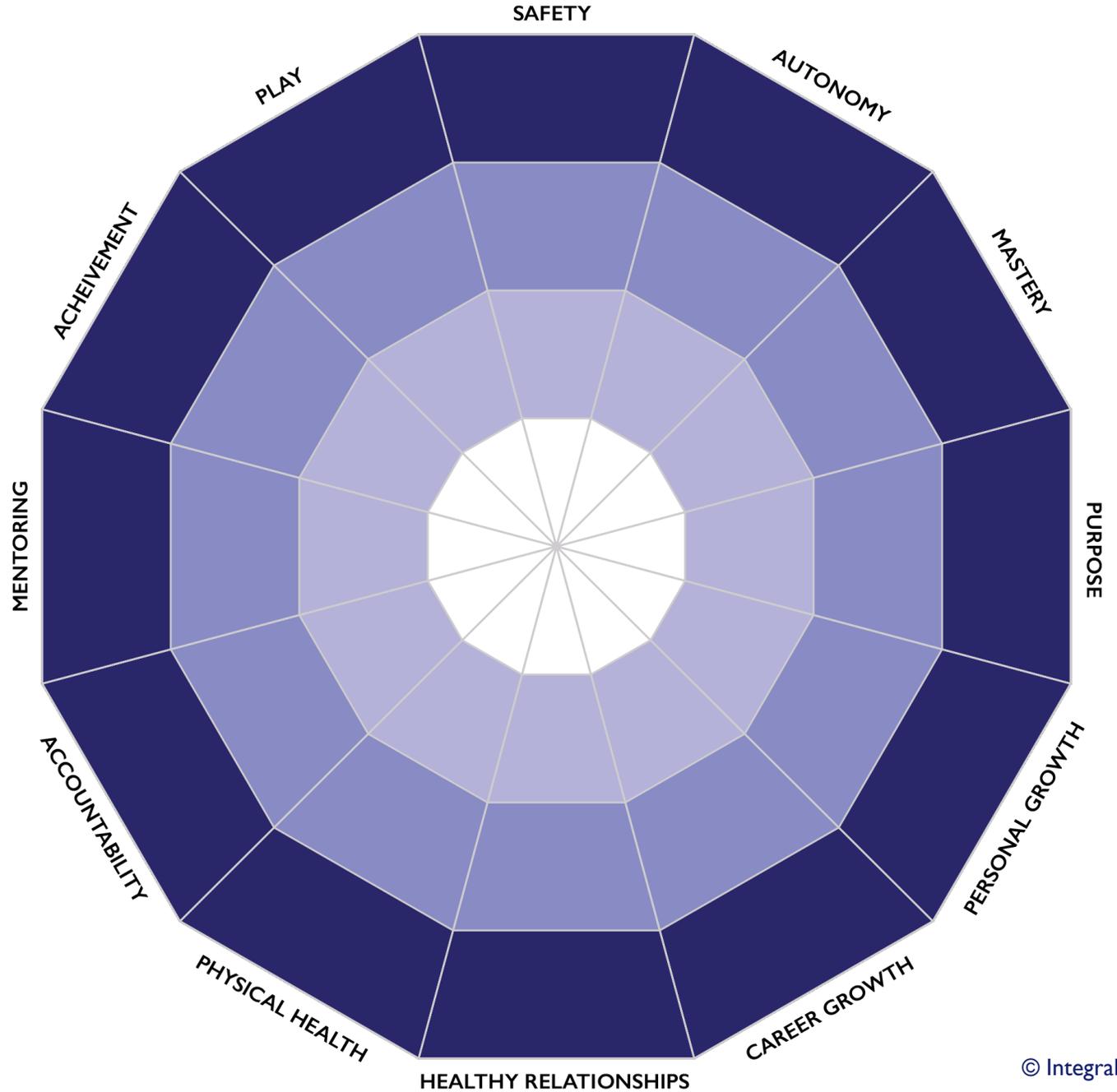
RI – MASTER: My role here allows me to express the gift my talent can bring to the world.

VALUES, SKILLS AND GOALS	PRODUCT AND IMPACT	
Aware of the current goal	Picks up next high priority item	SHU
Awareness of their own life's purpose	Rapid decision making based on purpose	HA
Giving my unique gift to the world	Manifests own purpose	RI
Alignment of personal and organizational purpose	Environment allows for the expression of a person's gifts in their work	RI
Aware of organizational purpose	Processes allow for personal expression in the service of organizational goals	HA
Aware of team vision	Environment optimized to enable organizational purpose	SHU
LEADERSHIP AND CULTURE	MARKETS AND ENVIRONMENT	



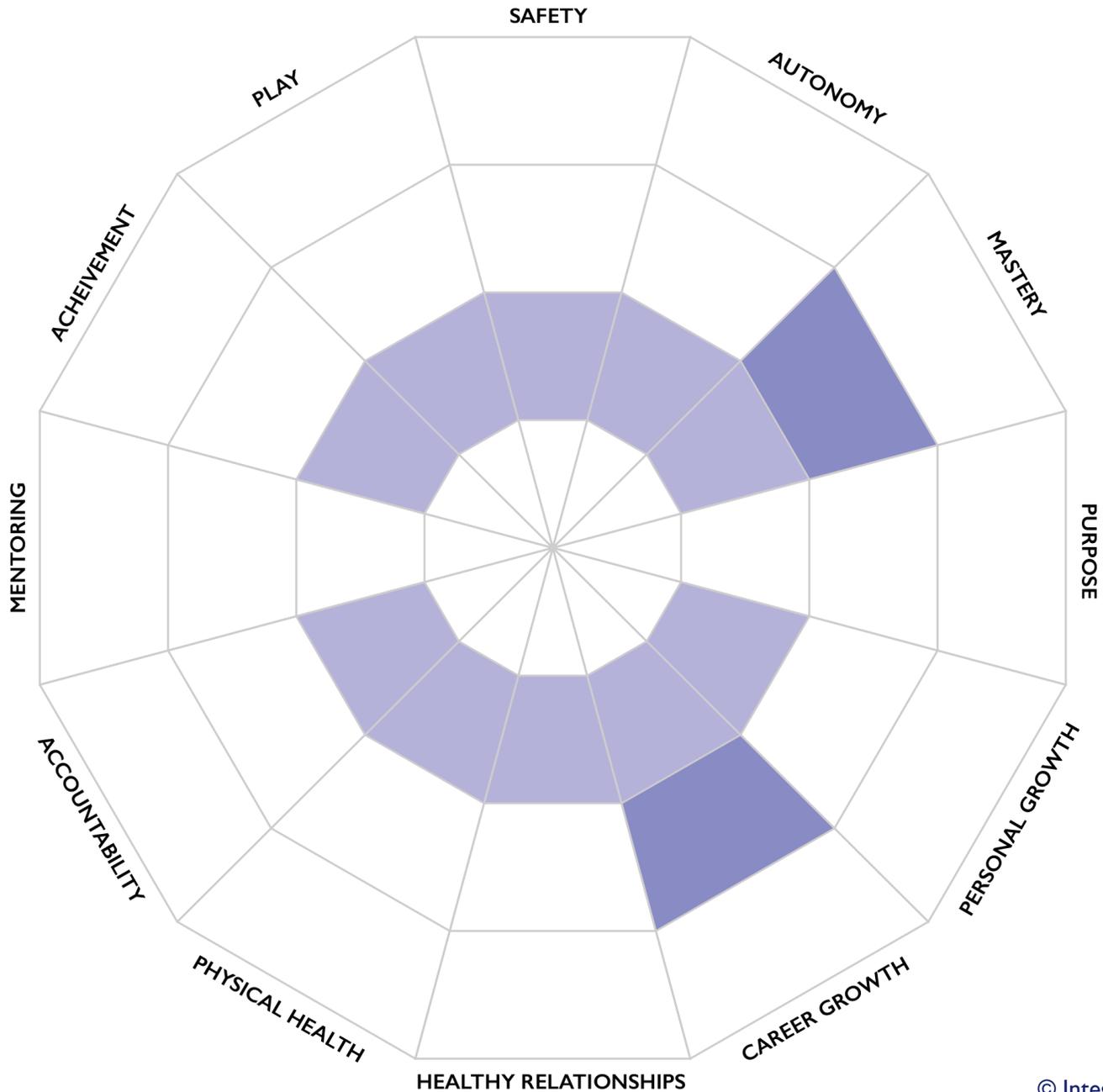
How can we use this with our teams?

-  UNAWARE
-  SHU - BEGINNING
-  HA - PRACTICING
-  RI - MASTER



Example Chart After Assessment

- UNAWARE
- SHU - BEGINNING
- HA - PRACTICING
- RI - MASTER



Use this worksheet with your teams to see where they need the most support

CHECK THE BOXES IN EACH ROW THAT DESCRIBE YOUR EXPERIENCE. THE ROWS OR COLUMNS WITH THE LEAST CHECKS ARE THE KEYS TO IMPROVING YOUR WORK LIFE.

TWELVE DIMENSIONS OF HEALTH	INDIVIDUAL, INTERNAL (UL) <i>HOW AM I FEELING, WHAT DO I KNOW?</i>	GROUP, INTERNAL (LL) <i>HOW ARE WE FEELING TOGETHER? WHAT'S OUR CULTURE?</i>	INDIVIDUAL, EXTERNAL (UR) <i>WHAT HAVE I PRODUCED? HOW AM I BEHAVING?</i>	GROUP, EXTERNAL (LR) <i>WHAT IS OUR WORK SPACE LIKE? WHAT ARE OUR SYSTEMS/STRUCTURES?</i>
Safety	<input type="checkbox"/> Feeling of security	<input type="checkbox"/> Culture of acceptance	<input type="checkbox"/> Willingness to take risks	<input type="checkbox"/> Room is created for personal needs
Play	<input type="checkbox"/> Failure = learning, take a lighter perspective	<input type="checkbox"/> Creativity & play through success or failure	<input type="checkbox"/> Team often innovates, laughter is abundant	<input type="checkbox"/> Fun & socializing are a part of team activities
Autonomy	<input type="checkbox"/> Empowered to act & responsible for result	<input type="checkbox"/> Team members support each other's autonomy	<input type="checkbox"/> Effort towards a boost in all relevant KPIs	<input type="checkbox"/> Proximal decision making
Mastery	<input type="checkbox"/> Proficiency in desired skills	<input type="checkbox"/> Communities of practice (mentoring groups)	<input type="checkbox"/> Tangible impact to delivery and quality	<input type="checkbox"/> Schdeule/cadence of educational/training sessions
Purpose	<input type="checkbox"/> Awareness of their own life's purpose	<input type="checkbox"/> Aware of organizational purpose	<input type="checkbox"/> Rapid decision making based on purpose	<input type="checkbox"/> Processes allow for personal expression
Personal Growth	<input type="checkbox"/> Committed to a personal growth journey	<input type="checkbox"/> Team coaches each other	<input type="checkbox"/> Stretches past their comfort zone	<input type="checkbox"/> Creates safe conditions for people to fail
Career Growth	<input type="checkbox"/> Vision for career growth path	<input type="checkbox"/> Team enables each other's career growth	<input type="checkbox"/> Can promote into a different skillsets	<input type="checkbox"/> Roles & Incentives are aligned to career growth
Healthy Relationships	<input type="checkbox"/> Empathy	<input type="checkbox"/> Team shares/alignes to values	<input type="checkbox"/> Team behaves from shared values	<input type="checkbox"/> Team building activities
Support & Mentoring	<input type="checkbox"/> Desire to teach/learn	<input type="checkbox"/> Vulnerability	<input type="checkbox"/> Mentees become mentors for others	<input type="checkbox"/> Mentorship is encouraged/rewarded
Accountability	<input type="checkbox"/> Responsible mindset	<input type="checkbox"/> Culture of support (not blame)	<input type="checkbox"/> Says no when they realize they cannot commit	<input type="checkbox"/> Accountability comes with rewards and consequences
Acheivement	<input type="checkbox"/> Willing to leave comfort zone to create impact	<input type="checkbox"/> Knowledge sharing	<input type="checkbox"/> Tangible improvement to quality & impact	<input type="checkbox"/> Effective collaboration/working spaces and tools
Physical Health	<input type="checkbox"/> Recognition that health is the reward	<input type="checkbox"/> Ask friends for support, learn from others	<input type="checkbox"/> Clear long term goals	<input type="checkbox"/> Create an environment conducive to good health



If you'd like to learn more about how Integral Theory can improve your Agile results, stop by our booth!

IMAGINE THE PARTS OF YOUR ORGANIZATION SYNCED LIKE A CLOCK

The whole of your organization is made up of autonomous parts. Those parts are whole things (like teams) which have their own parts (individuals).

Integral Theory calls parts that are also wholes "holons."

WHEN HOLONS WORK WELL TOGETHER, THEY CAN ACCOMPLISH MORE.

They work more efficiently, they adapt to change quickly, and the experience of working is easier and happier.

BUT SOMETIMES HOLONS AREN'T HEALTHY OR HAPPY.

they can be dysfunctional, hidden from others, can't see what others are doing, fighting over resources, out of sync, and unable to communicate what they need, or when.

THE HIDDEN CULTURAL NORMS THAT MIGHT BE HINDERING YOUR TEAM

The people and teams in your organization have different essential abilities; these often include:

- Interpersonal skills
- Creativity
- Self-management
- Community
- Budgeting
- Innovation

In your next meeting consider assessing their capacities along what Integral Theory's Lines of Intelligence. You will be able to see how a mismatch of team values and organizational cultures with strategic outcomes could be helping or hindering your company's success.

A RULES-ORIENTED TEAM MIGHT HANDLE INCENTIVES

in an unhealthy way: Forcing unquestioned compliance e.g. Because "that's how it's always been done"

or in a healthy way: To minimize risk and avoid mistakes

AN ACHIEVEMENT-ORIENTED DEPARTMENT MIGHT HANDLE INCENTIVES

in an unhealthy way: Encouraging selfish behaviors or short-term rewards

or in a healthy way: To drive healthy competition in a department-based context

A RELATIONAL-ORIENTED COMPANY MIGHT HANDLE INCENTIVES

in an unhealthy way: Rewarding everyone regardless of impact

or in a healthy way: To encourage health and to align everyone's purpose with that of the company

AN INTEGRAL-ORIENTED COMPANY MIGHT HANDLE INCENTIVES

To serve the organization's highest purpose by balancing compliance (control), results (achievement) and relationships (culture). Alignment of teams to the organizational purpose enables them to set their own incentivization.

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TAKING A FOUR QUADRANT PERSPECTIVE ENABLES US TO SEE REALITY IN ITS TOTALITY. EACH QUADRANT REVEALS A DISTINCT INSIGHT.

I INDIVIDUAL IT	
MY THOUGHTS & FEELINGS Autonomy Mastery Purpose, values Goals Skills Motivations Creative spark Sense of self Beliefs/Philosophies	MY ARTIFACTS & RESULTS Products (Software, etc.) Quality of work Impact Style Durability Behavior Body language Self expression Physical health
INTERIOR	EXTERIOR
Sense of belonging Team culture "Vibe" / collective energy Implicit agreements Unspoken roles Social norms Professional relationships Morale	Schedules Working processes Tools and systems Workflows Rules Locations Workspaces Meeting spaces
WE GROUP ITS	
MY RELATIONSHIPS	MY ENVIRONMENT

THE FOUR VALUES OF THE AGILE MANIFESTO MAP TO THE FOUR QUADRANTS OF INTEGRAL THEORY. THIS HELPS EXPLAIN AGILE'S LONG TERM SUCCESS.

VALUES, GOALS, SKILLS, MOOD	PRODUCT, QUALITY, IMPACT
Individuals & Interactions over processes & tools	Working software over comprehensive documentation
Customer collaboration over contract negotiation	Responding to change over following a plan
RELATIONSHIPS, CULTURE	ENVIRONMENTS, MARKETING

TYPES IN INTEGRAL THEORY ARE THE EXPRESSION OF YOUR CAPABILITIES. THERE ARE DIFFERENT TYPES OF PEOPLE IN THE WORLD. SOME OF US ARE:

WHEN GROUPS WORK WELL TOGETHER, THEY CAN ACCOMPLISH MORE.

ALL OF THESE ROLES BRING VALUE TO THE ORGANIZATION, HELP TEAMS TO BETTER THEIR BEST, AND CAN MAKE OUR JOBS MORE FULFILLING

Your unique typology doesn't say what you cannot do. It points to the unique ways you might be able to:

*"Transferring your passion to your job is far easier than finding a job that happens to match your passion."
- Seth Godin, Linchpin: Are You Indispensable?*

INTEGRAL THEORY: LEVELS OF DEVELOPMENT (SPIRAL DYNAMICS)

Levels of Development represent core value systems. While people are capable of experiencing many different value systems, individuals typically experience the world from one primary point of view with Amber, Orange, Green and Teal being predominant in the professional world today.

Each successive level transcends and includes the previous level, individuals have access to all the levels below. While a person's core value system (their Stage) might be at any level of development, they are capable of temporary experiences (their State) at any level of the spiral.

When organizations address the full range of values based needs, people, teams, and organizations will be the healthiest version of themselves, more capable of demonstrating their highest potential.

SECOND TIER

- Teal: Integrated Individualism** - Starting 40 years ago. Monumental Teal Teal can see the whole spiral and all systems across several generations or time. **What Teal Needs:** Wholeness & Integrity. Experiences the "Structural interconnection between all things." **What Teal Needs:** Authenticity, synergy, the realization of their life's deepest purpose. **Example:** A leader who optimizes flow of value through their system by integrating order, achievement, and collective harmony.
- Green: Social Democracies** - Starting 170 years ago. Orange's enclosed drive creates the need for progress with responsibility, literacy as an indicator of evolution in the world. **What Green Values:** Connectedness, equality, health, cooperation, diversity, sustainability and self awareness. **What Green Needs:** To heal the life of those who came before. Environmental and social health, justice, and equality. **Example:** A leader who fosters inclusion and collaboration to improve morale and quality of life.
- Orange: Capitalistic Democracies** - Scientific Rationalism. Working "outside" nature's search for stability - the scientific method is born. **What Orange Values:** Boldness, competition, and success verified through results oriented, data driven feedback loops. **What Orange Needs:** Personal growth and achievement. **Example:** A leader who is willing to break the rules to drive KPIs, innovation, and technological solutions.
- Amber: Late Mythic, Nation States** - starting 5000 years ago. The close and destruction of Red structures brought forth the need for order. **What Amber Values:** Conformity, security, minimizing risk, rules and order. Stable rules and well-defined organizational structure. **What Amber Needs:** Security & support including stability, privacy, status, identity and future projects. **Example:** A leader who enforces compliance with the chosen Agile framework.
- Red: Early Mythic, Feudal** - starting 10,000 years ago. The powerful realize they can take from those weaker than them. **Example:** A leader who, when challenged, absolutely destroys the challenger with an overwhelming display of force.
- Magenta: Tribal Order** - starting 50,000 years ago. Magical aspects of the world are explored through magic and superstition. **Example:** A leader who thinks changing a roadmap will make the project finish on time and on budget.
- Infrared: Survival Bands** - starting 100,000 years ago. The family or clan was the core of human society and individuals were only concerned with surviving for food, water, and shelter. No society present in a professional environment.



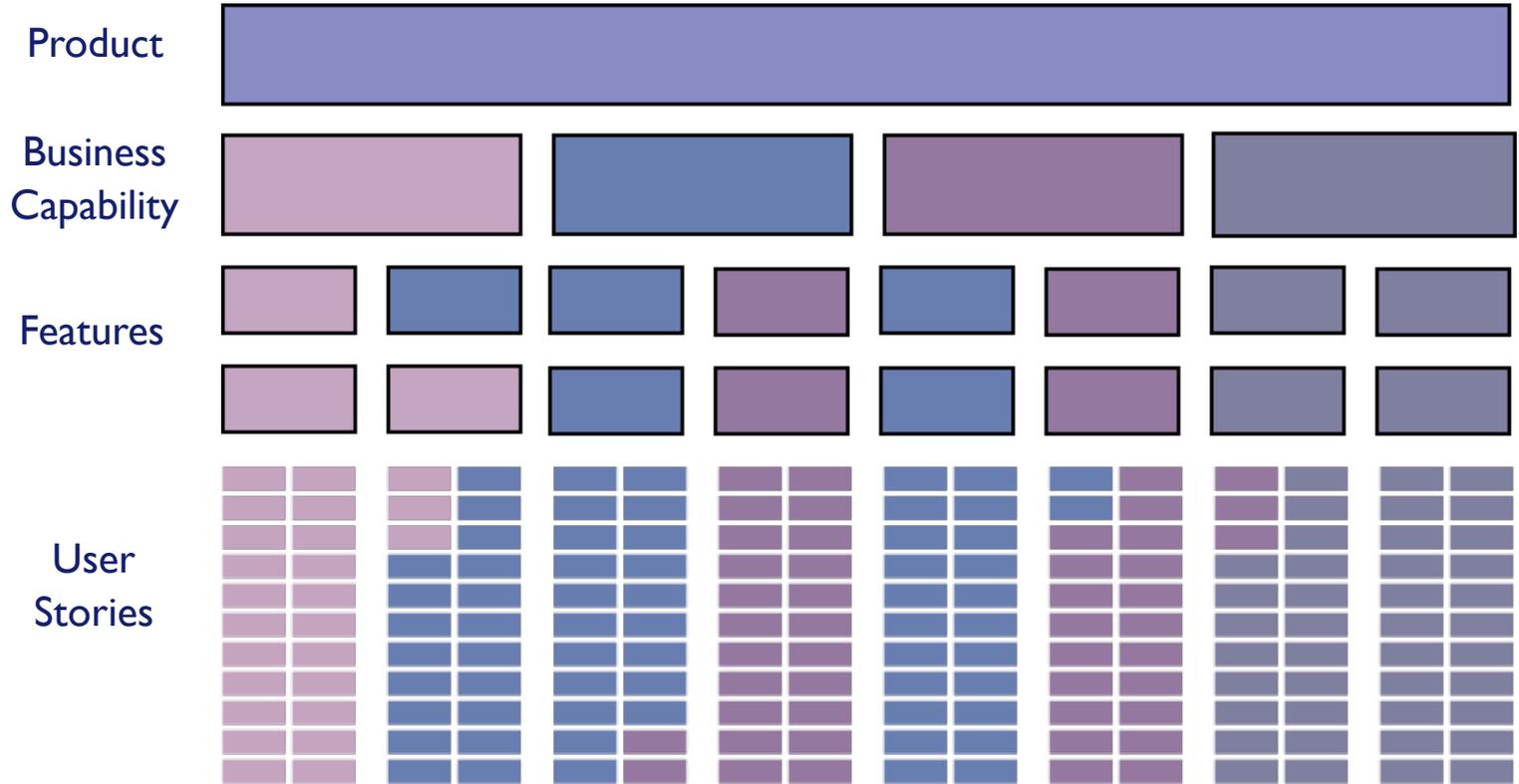
- ⌘ **Q:** Why does Holonic Health matter?
 - **A:** It's not possible to have healthy teams if the individuals who comprise them are themselves not healthy.
- ⌘ **Q:** What should we be focusing on?
 - **A:** Determine which of the 12 Dimensions of Health are most important to focus on in the short term (or create your own)
- ⌘ **Q:** Where are we on our journey (Shu, Ha, Ri) to become healthier?
 - **A:** Assess where your people and teams are. Co-create a growth plan to improve the quality of their working lives.
- ⌘ **Q:** How can we ensure we're addressing the **WHOLE** issue in a way that will be sustainable?
 - **A:** Use a Four Quadrant Perspective to craft a **complete** solution that will be durable by addressing internal and external concerns.
- ⌘ **Q:** What do we do next?
 - **A:** The continuous improvement journey is never complete. As pain points are alleviated, new opportunities will present themselves. **STAY ON THE PATH!**

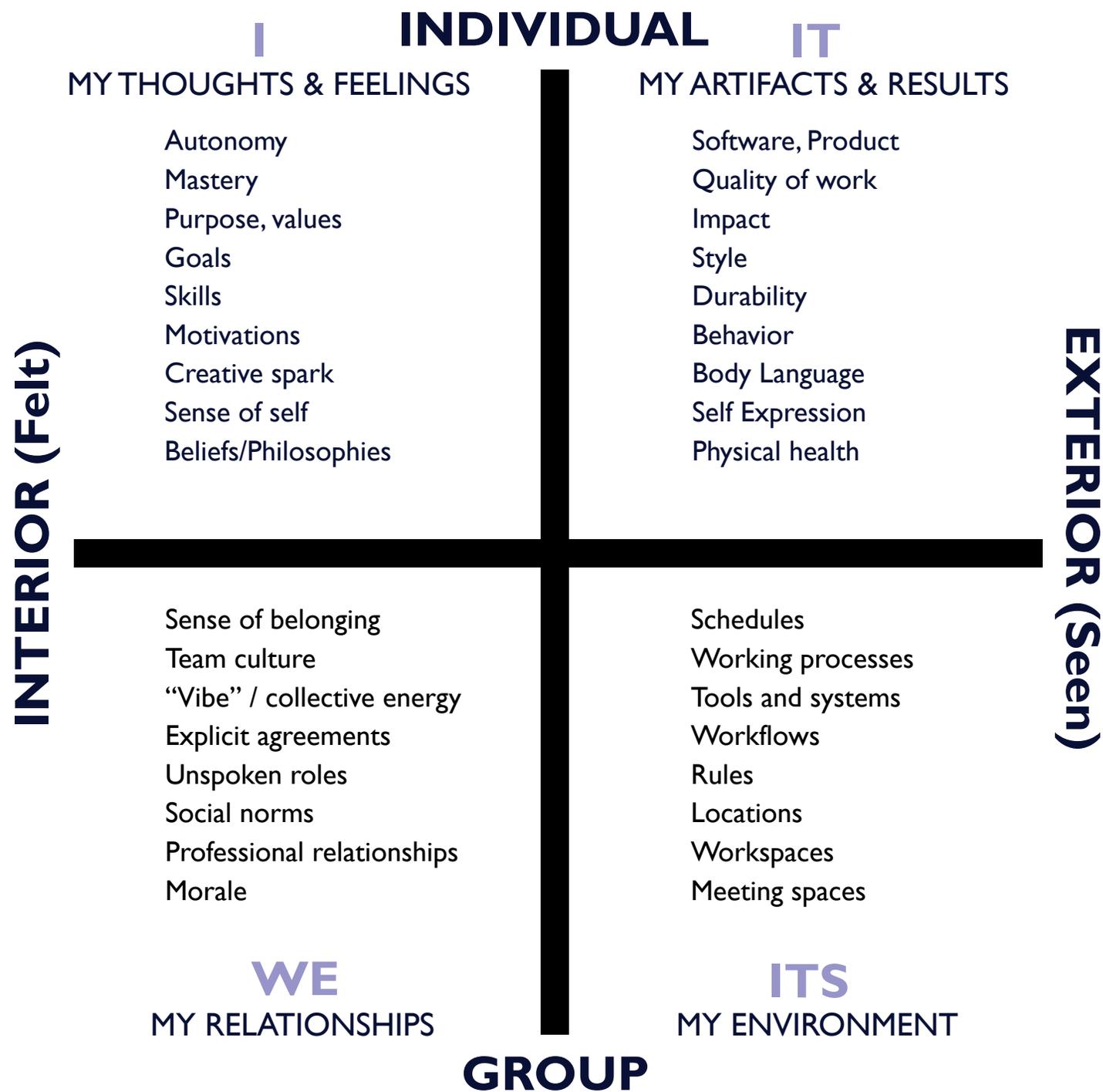




Appendix: Some extra details

THE AGILE WORK STRUCTURE IS ALREADY HOLOVIC





THE AGILE MANIFESTO HITS ALL 4 QUADRANTS

VALUES, SKILLS AND GOALS	PRODUCT AND IMPACT
Individuals & Interactions over processes & tools	Working software over comprehensive documentation
Customer collaboration over contract negotiation	Responding to change over following a plan
LEADERSHIP AND CULTURE	MARKETS AND ENVIRONMENT



Deep Dive Example: SAFETY

SHU - BEGINNER

HA - PRACTITIONER

RI - MASTER

RI - MASTER

HA - PRACTITIONER

SHU - BEGINNER

VALUES, SKILLS AND GOALS	PRODUCT AND IMPACT
Conscious choice to be less defensive (assume positive intent)	Non-violent communication, clean things up after conflicts
Feeling of security	Willingness to take risks
Authenticity, Empathy, embracing failure as a part of life	Self expression, failure is celebrated as learning
Culture of trust, compassion, vulnerability	Systems & structures support openness & transparency with guard rails. Fair, discreet issue resolution
Culture of no judgement	Room is created for personal needs & confidential communication of issues
Culture of listening	Explicit working agreements that promote safety and trust (we don't promote blame/fear)
LEADERSHIP AND CULTURE	MARKETS AND ENVIRONMENT

