Sustainable Agility – Can we have Team Health without Individual Health?
I have been practicing Agile since 2008 and have 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**
- Regional: 31% (−2)
- Global: 23% (+2)

**Quiet Quitting**
- Regional: 52% (+1)
- Global: 59% (−1)

**Loud Quitting**
- Regional: 17% (+2)
- Global: 18% (−1)

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%

**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


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

<table>
<thead>
<tr>
<th>Regional</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>18%</td>
<td>21%</td>
</tr>
</tbody>
</table>

**Gender**

- 18% Female
- 18% Male

**Job Level**

- 18% Manager
- 18% Individual contributor

**Age**

- 20% <40 years old
- 16% ≥40 years old

**Work Location**

- 15% Exclusively remote
- 16% Hybrid
- 18% On-site


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

<table>
<thead>
<tr>
<th>Regional</th>
<th>Gender</th>
<th>Job Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>47%</td>
<td>Female</td>
<td>44% Manager</td>
</tr>
<tr>
<td></td>
<td>Male</td>
<td>48% Individual contributor</td>
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</table>

<table>
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<th>Global</th>
<th>Age</th>
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<td>51%</td>
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<td>≥40 years old</td>
<td>50% Hybrid</td>
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<td></td>
<td></td>
<td>47% On-site</td>
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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?
12 Dimensions of Individual Health
<table>
<thead>
<tr>
<th>SAFETY</th>
<th>PLAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUTONOMY</td>
<td>HEALTHY RELATIONSHIPS</td>
</tr>
<tr>
<td>MASTERY</td>
<td>ACCOUNTABILITY</td>
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<tr>
<td>PURPOSE</td>
<td>MENTORING</td>
</tr>
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<td>PERSONAL GROWTH</td>
<td>ACHIEVEMENT</td>
</tr>
<tr>
<td>CAREER GROWTH</td>
<td>PHYSICAL HEALTH</td>
</tr>
</tbody>
</table>
“Control leads to compliance; autonomy leads to engagement.” - Daniel H. Pink

SAFETY

AUTONOMY

MASTERY

PURPOSE

PERSONAL GROWTH

CAREER GROWTH

PLAY

HEALTHY RELATIONSHIPS

ACCOUNTABILITY

MENTORING

ACHIEVEMENT

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

- **BEGINNING**
  - SHU - OBEY THE RULES
- **PRACTICING**
  - HA - BEND THE RULES
- **MASTER**
  - RI - TRANSCEND THE RULES
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

4) I am usually aware of how to use my time to deliver maximum value/impact.
The Four Quadrants – The 4 different perspectives in which reality takes place
The Four Quadrants – The 4 different perspectives in which reality takes place

- **INDIVIDUAL**
  - **WE** (Group Interior)
  - **ITS** (Group Exterior)

- **IT**
  - **I** (Individual Interior)
  - **IT** (Individual Exterior)
How do the Four Quadrants apply to your life?

**INDIVIDUAL**

- **VALUES, SKILLS AND GOALS**
  - How I see myself
  - What I'm good at
  - How I'm feeling
  - What motivates me

- **PRODUCT AND IMPACT**
  - My computer
  - My favorite chair
  - The work I produce
  - My phone

**WE**

- **LEADERSHIP AND CULTURE**
  - My friendships
  - My family bonds
  - My community
  - Good/bad vibes

- **MARKETS AND ENVIRONMENT**
  - My computer network
  - My home
  - My commute to work
  - My cellphone provider

**GROUP**

**IT**
Exercise: MASTERY – Discuss in your group how this could apply to mastery in your profession/skillset
A DESIRE TO MASTER A SKILL(S)

KNOWLEDGE sharing/MENTORING

VALUES, SKILLS AND GOALS

LEADERSHIP AND CULTURE

PRODUCT AND IMPACT

MARKETS AND ENVIRONMENT

LIVING REPOSITORY OF KNOWLEDGE/INFORMATION (SELF SERVICE)

EMPIRICAL FEEDBACK ALLOWING FOR GROWTH/IMPROVEMENT
Let's combine these ideas: The PURPOSE Journey overlaid into the Quadrants

<table>
<thead>
<tr>
<th>VALUES, SKILLS AND GOALS</th>
<th>PRODUCT AND IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aware of the current goal</td>
<td>Picks up next high priority item</td>
</tr>
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<th>MARKETS AND ENVIRONMENT</th>
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<tbody>
<tr>
<td>Aware of team vision</td>
<td>Environment optimized to enable organizational purpose</td>
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**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.
Let's combine these ideas: The PURPOSE Journey overlaid into the Quadrants

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<td>Picks up next high priority item</td>
</tr>
<tr>
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<td>Rapid decision making based on purpose</td>
</tr>
<tr>
<td>Aware of organizational purpose</td>
<td>Processes allow for personal expression in the service of organizational goals</td>
</tr>
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<td>Aware of team vision</td>
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**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.
Let's combine these ideas: The PURPOSE Journey overlaid into the Quadrants

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<tbody>
<tr>
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</tr>
<tr>
<td>Awareness of their own life’s purpose</td>
<td>Rapid decision making based on purpose</td>
</tr>
<tr>
<td>Giving my unique gift to the world</td>
<td>Manifests own purpose</td>
</tr>
<tr>
<td>Alignment of personal and organizational purpose</td>
<td>Environment allows for the expression of a person’s gifts in their work</td>
</tr>
<tr>
<td>Aware of organizational purpose</td>
<td>Processes allow for personal expression in the service of organizational goals</td>
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**HA –** I’m aware of my purpose in the world and how I can best contribute to my team’s overall goals.

**RI – MASTER:** My role here allows me to express the gift my talent can bring to the world.
How can we use this with our teams?
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.

<table>
<thead>
<tr>
<th>Twelve Dimensions of Health</th>
<th>Individual, Internal (UL)</th>
<th>Group, Internal (LL)</th>
<th>Individual, External (UR)</th>
<th>Group, External (LR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety</td>
<td>Feeling of security</td>
<td>Culture of acceptance</td>
<td>Willingness to take risks</td>
<td>Room is created for personal needs</td>
</tr>
<tr>
<td>Play</td>
<td>Failure = learning, take a lighter perspective</td>
<td>Creativity &amp; play through success or failure</td>
<td>Team often innovates, laughter is abundant</td>
<td>Fun &amp; socializing are a part of team activities</td>
</tr>
<tr>
<td>Autonomy</td>
<td>Empowered to act &amp; responsible for result</td>
<td>Team members support each other’s autonomy</td>
<td>Effort towards a boost in all relevant KPIs</td>
<td>Proximal decision making</td>
</tr>
<tr>
<td>Mastery</td>
<td>Proficiency in desired skills</td>
<td>Communities of practice (mentoring groups)</td>
<td>Tangible impact to delivery and quality</td>
<td>Schedule/ cadence of educational/ training sessions</td>
</tr>
<tr>
<td>Purpose</td>
<td>Awareness of their own life’s purpose</td>
<td>Aware of organizational purpose</td>
<td>Rapid decision making based on purpose</td>
<td>Processes allow for personal expression</td>
</tr>
<tr>
<td>Personal Growth</td>
<td>Committed to a personal growth journey</td>
<td>Team coaches each other</td>
<td>Stretches past their comfort zone</td>
<td>Creates safe conditions for people to fail</td>
</tr>
<tr>
<td>Career Growth</td>
<td>Vision for career growth path</td>
<td>Team enables each other’s career growth</td>
<td>Can promote into a different skillset</td>
<td>Roles &amp; Incentives are aligned to career growth</td>
</tr>
<tr>
<td>Healthy Relationships</td>
<td>Empathy</td>
<td>Team shares/alignes to values</td>
<td>Team behaves from shared values</td>
<td>Team building activities</td>
</tr>
<tr>
<td>Support &amp; Mentoring</td>
<td>Desire to teach/learn</td>
<td>Vulnerability</td>
<td>Mentees become mentors for others</td>
<td>Mentorship is encouraged/rewarded</td>
</tr>
<tr>
<td>Accountability</td>
<td>Responsible mindset</td>
<td>Culture of support (not blame)</td>
<td>Says no when they realize they cannot commit</td>
<td>Accountability comes with rewards and consequences</td>
</tr>
<tr>
<td>Achievement</td>
<td>Willing to leave comfort zone to create impact</td>
<td>Knowledge sharing</td>
<td>Tangible improvement to quality &amp; impact</td>
<td>Effective collaboration/ working spaces and tools</td>
</tr>
<tr>
<td>Physical Health</td>
<td>Recognition that health is the reward</td>
<td>Ask friends for support, learn from others</td>
<td>Clear long term goals</td>
<td>Create an environment conducive to good health</td>
</tr>
</tbody>
</table>
If you’d like to learn more about how Integral Theory can improve your Agile results, stop by our booth!
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 HOLONIC

- Product
- Business Capability
- Features
- User Stories
Augmenting the Agile journey with Integral Theory

THE AGILE MANIFESTO HITS ALL 4 QUADRANTS

<table>
<thead>
<tr>
<th>VALUES, SKILLS AND GOALS</th>
<th>PRODUCT AND IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Individuals &amp; Interactions</strong>&lt;br&gt;over processes &amp; tools</td>
<td><strong>Working software</strong>&lt;br&gt;over comprehensive documentation</td>
</tr>
<tr>
<td><strong>Customer collaboration</strong>&lt;br&gt;over contract negotiation</td>
<td><strong>Responding to change</strong>&lt;br&gt;over following a plan</td>
</tr>
</tbody>
</table>

LEADERSHIP AND CULTURE | MARKETS AND ENVIRONMENT
## Deep Dive Example: SAFETY

### VALUES, SKILLS AND GOALS

| SHU - BEGINNER | Conscious choice to be less defensive (assume positive intent) |
| HA - PRACTITIONER | Feeling of security |
| RI - MASTER | Authenticity, Empathy, embracing failure as a part of life |
| RI - MASTER | Culture of trust, compassion, vulnerability |
| HA - PRACTITIONER | Culture of no judgement |
| SHU - BEGINNER | Culture of listening |

### PRODUCT AND IMPACT

| Non-violent communication, clean things up after conflicts |
| Willingness to take risks |
| Self expression, failure is celebrated as learning |
| Systems & structures support openness & transparency with guard rails. Fair, discreet issue resolution |
| Room is created for personal needs & confidential communication of issues |
| Explicit working agreements that promote safety and trust (we don’t promote blame/fear) |

### LEADERSHIP AND CULTURE

- Conscious choice to be less defensive (assume positive intent)
- Feeling of security
- Authenticity, Empathy, embracing failure as a part of life
- Culture of trust, compassion, vulnerability
- Culture of no judgement
- Culture of listening

### MARKETS AND ENVIRONMENT