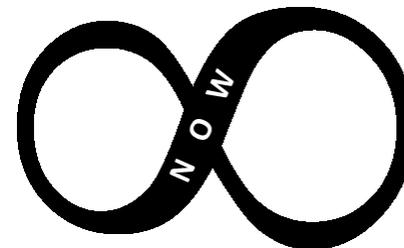


# **Chaordic Stepping Stones – Complimentary Evaluation Copy**

**marcus evans** 5<sup>th</sup> Edition - Risk Data Aggregation and Reporting  
*Benchmark progress on BCBS 239 and assess its ongoing impact on businesses*

Hilton Canary Wharf, London, 28<sup>th</sup> April 2016

Carpe Momentum Advisory – Andreas Metzen  
*Sustainable Change - Sustainable Business*



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# Chaordic Stepping Stones – Complimentary Evaluation Copy

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## **1** Chaordic Stepping Stones Introduction

**1.1 | Overview**

**1.2 | Need – Purpose - Principles**

**1.3 | People - Concept**

**1.4 | Limiting Beliefs - Structure**

**1.5 | Practice - Harvest**



# 1 Chaordic Stepping Stones

## 1.1 | Overview

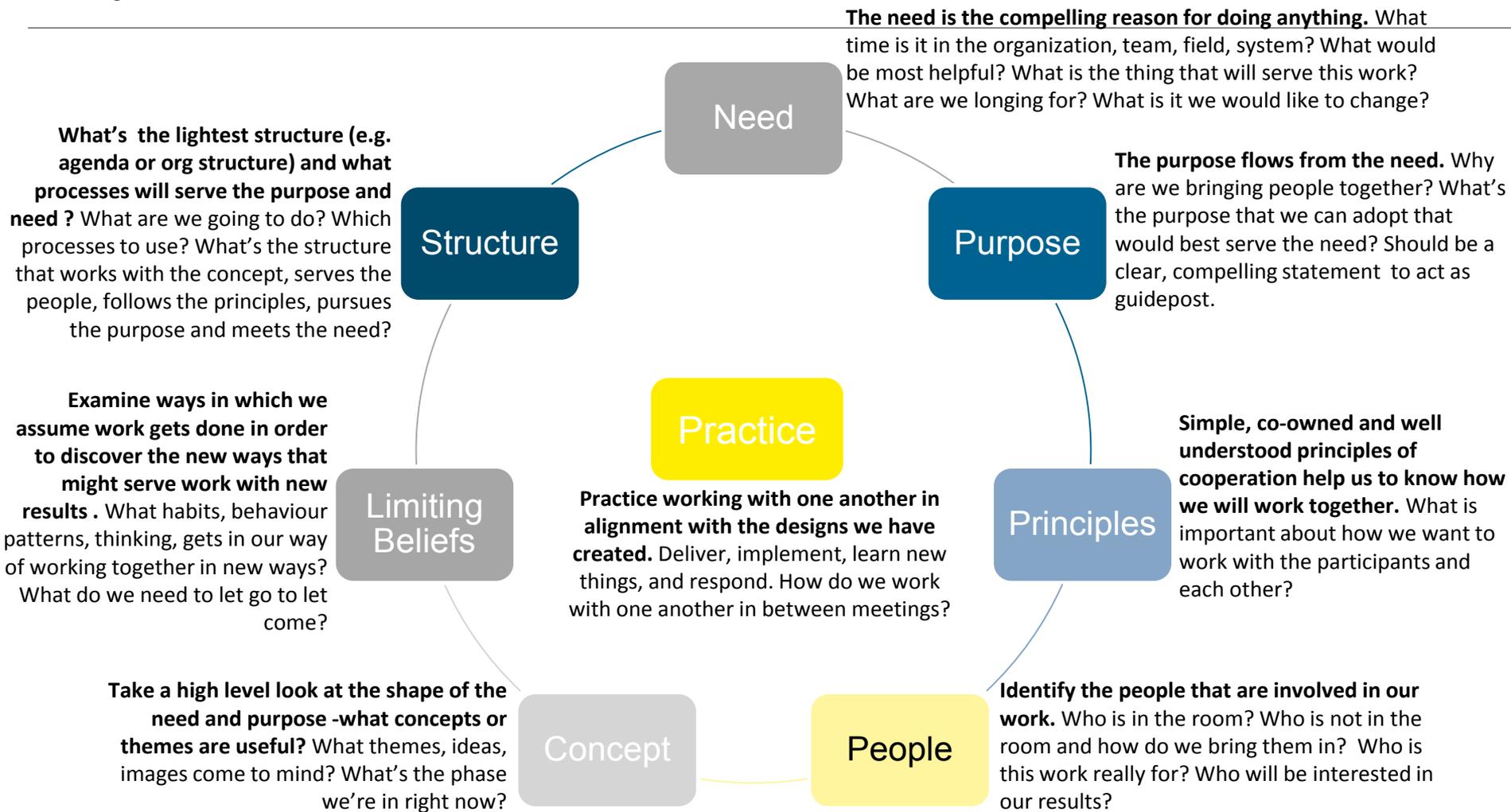
- Need
- Purpose
- Principles
- People
- Concept
- Limiting Beliefs
- Structure
- Practice
- Harvest



# 1 Chaordic Stepping Stones

## 1.1 | Overview

The questions are to prompt conversation. Although the steps aren't sequential, it is common to start with need.



← Harvest : How do we make meaning of the work, tell our story, feed results forward? →





# 1 Chaordic Stepping Stones

## 1.2 | Need – Purpose - Principles

- **Need**
  - What is the need that this group can uniquely meet?
  - The need is the compelling reason for doing anything. Sensing the need is the first step to designing a meeting, organizational structure or change initiative that is relevant. The need is outside of our work: it is the thing that is served by the work you are doing.
- **Purpose**
  - If this work should live up to its fullest potential, what do you dream (or vision) is possible? What is the next level for the for our work? Where should we be heading?
  - From the need flows the purpose. Purpose statements are clear and compelling and the guide us in doing our best possible work.
- **Principles**
  - What is it important to remember about how we want to work with the participants in our initiative? What do we think is most important to remember as we design to meet the need and purpose?
  - Principles of cooperation help us to know how we will work together. It is very important that these principles be simple, co-owned and well understood. These are not principles that are platitudes or that lie on a page somewhere. They are crisp statements of how we agree to operate together so that over the long term we can sustain the relationships that make this work possible.





# 1 Chaordic Stepping Stones

## 1.3 | People - Concept

- **People**
  - Who is in the room?  
Who is not in the room and how do we bring them in?  
How do we leverage relationships to propagate the ideas generated by our work together?  
Who will be interested in the results of our work?
  - Once the need and the purpose are in the place and we have agreed on our principles of cooperation, we can begin to identify the people that are involved in our work. Mapping the network helps us to see who is in this work for us and who will have an interest in what we are doing.
- **Concept**
  - What is the deeper pattern of our work and what organizational forms are in alignment with that?  
How might we activate our principles to best do our work?
  - This is a high level look at the shape of our endeavor. For example, if our need was to design a way to cross a body of water, we could choose a bridge, a causeway or a ferry. The concept gives form to different structures or organization for doing our work. We might explore the structures, such as circles and networks – understand what these are, how they operate, how they are embedded with various contexts and cultures and what implications each has for our work.





# 1 Chaordic Stepping Stones

## 1.4 | Limiting Beliefs - Structure

### ▪ Limiting Beliefs

- What makes us uncomfortable, and what do we fear about new ways of working together? What will it take for us to fully enter into working in new and unfamiliar ways?
- So much of what we do when we organize ourselves is based on unquestioned models of behavior. These patterns can be helpful but they can also limit us in fulfilling our true potential. We cannot create innovation in the world using old models and approaches. It pays to examine ways in which we assume work gets done in order to discover the new ways that might serve work with new results. Engaging in this work together brings us into a co-creative working relationship, where we can help each other into new and powerful ways of working together, alleviating the fear and anxiety of the unknown.

### ▪ Structure

- How do we support the aspirations of the group? What is the lightest structure that will serve our purpose and need?
- Once the concept has been chosen, it is time to create the structure that will channel our resources. It is in these conversations that we make decisions about the resources of the group: time, money, energy, commitment, and attention. In the case of a meeting or gathering, it is through these conversations that we decide on the agenda for the time together. What's the structure that works with the concept, serves the people, follows the principles, pursues the purpose and meets the need?





# 1 Chaordic Stepping Stones

## 1.5 | Practice - Harvest

- **Practice**
  - What commitments are we willing to make to contribute to the success of our endeavor?  
What do we need to do to sustain our work together?
  - The ongoing practice within the structures we build is important. This is the world of to do lists, conference calls and email exchanges. The invitation here is to practice working with one another in alignment with the designs we have created. Deliver, implement, learn new things, and respond.
- **Harvest**
  - What are the feedback loops that we need to design to ensure that learning and change accelerates itself?  
How will we stay open to emergent learning?
  - There is no point in doing work in the world unless we plan to harvest the fruits of our labors. Harvesting includes making meaning of our work, telling the story and feeding forward our results so that they have the desired impacts in the world.



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"As you think, so shall you become."  
Bruce Lee

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