

habitat metanoia



A New Management Model

Letter from the Director



Dear Reader,

I am writing to share a life-changing experience I had in 1993 when I attended one of Dr. Deming's seminars. Those four days had an inexplicable effect on me, as if I were floating in a dream. It transformed my approach to management and leadership. I made a firm commitment to forsake conditioning and prioritize the holistic development of individuals. Despite the challenges and setbacks along the way, this principle has remained unwavering.

In 2017, during a crisis triggered by a major contract loss, everything clicked. The scattered ideas we had gathered over the years suddenly fell into place, revealing their true significance. Through integration and refinement, we developed Our Hero's Journey Management System (OHMS) through Habitat Metanoia. In the following pages, we will delve into it, exploring its elements and showcasing its potential. But first, let me provide the necessary context to demonstrate how our management system can flourish.

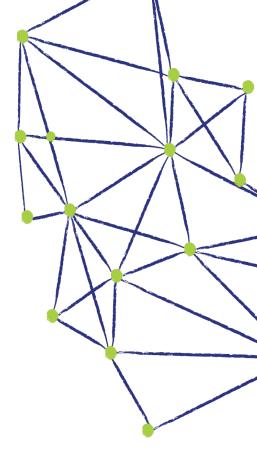
Thank you for your time in reading this magazine. I eagerly await the opportunity to discuss the transformative impact of Habitat Metanoia on the field of management.

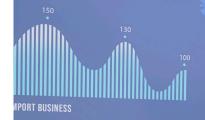
Sincerely,



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5 Benefits for Employees and Companies that Implement this Model

Managing a company to achieve its goals is an arduous and sometimes exhausting task. It involves overseeing processes, strategies and people, and this is where we want to emphasize this new management approach that benefits not only the employees but, more importantly, the goal of each project. In doing so, we can reap these benefits:

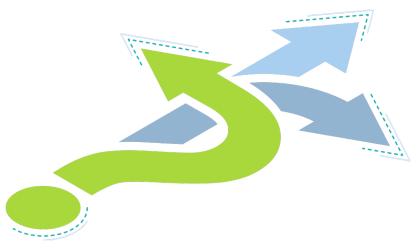
- 1 Improved Performance: Implementing the model promotes a balanced approach to managing the workplace, leading to improved performance as individual needs align with the organization's greater purpose and goals.
- 2 Enhanced Communication and Collaboration: The model fosters better communication and collaboration among team members by emphasizing shared values and a focus on achieving meaningful outcomes.
- Increased Employee Engagement:

 By valuing individual growth and accountability, the model creates a sense of empowerment and engagement among employees, motivating them to contribute actively to the organization's success.



- 4 Effective Problem-Solving: The focus on context and results, rather than mere outcomes, enables a more thorough and objective approach to problem-solving, leading to more effective and sustainable solutions.
- Organizational Resilience: By continually examining and improving systems, the model enhances the organization's resilience, enabling it to adapt to changing circumstances and thrive in challenging environments.





"Leadership can vary depending on the context, situation, and individual involved"

A Key Distinction:

The Game of the Genes vs. the Game of the Gods

In her 1992 book Systems of Survival Jane Jacobs "... explores the morals and values that underpin viable working life. Like the other animals, we find and pick up what we can use, and appropriate territories. But unlike the other animals, we also trade and produce for trade. Because we possess these two radically different ways of dealing with our needs, we also have two radically different systems of morals and values – both systems valid and necessary." What is interesting is that she also provides complete structures of coherence for both. Let 's dig deeper.

There are two points we would like to propose before moving on. Much later in his 2018 book 12 Rules for Life Jordan Petterson shows us that in the case of social animals the hierarchical game substitutes the territorial game played by individual animals, but the characteristics, the implications and the consequences for individuals of each of the species, including our own are very similar. This is the first point; we propose to extend Jacob´s first value system to include our hierarchical games.

Our second point is substituting the word commerce with transaction or negotiation in Jacob's second value system. We propose that every time we coordinate actions with another member of our community or speak about our needs with, for example members of our family, we are operating within the

rules (structure of coherence) of this system.

Let's keep digging. Jonathan Haidt in his 2012 book *The Righteous Mind*, uses metaphors to describe his three principles of morality. His third metaphor (with which we generally agree) is that we are 90% chimp and 10% bee. Separately Robin Dunbar in his 1996 book Language, Gossip and the Evolution of Language says "businesses with fewer than 150-200 people can be organized on entirely informal lines, relying on personal contacts between employees to ensure the proper exchange of information. But larger businesses require formal management structures to channel contacts and ensure that each employee knows what he or she is responsible for and whom they should report to". We agree with both Haidt and Dunbar



that language seems to have evolved primordially to play our hierarchical and social games and, therefore, these command and control structures seem to be an inevitable consequence of our nature, and it does, at least for our 90% chimp part. This is what I call the Game of the Genes. However, language also allows us explain two other important elements of our nature which are our capacity to coordinate actions among us and also to construct meaning. The first is what allows us to become specialized and the second enables us to construct shared intentionality, both are key elements behind our capacity to exchange and transact (in the broader sense we proposed before). When we are able to constructan environment that is safe and based on trust, then, as naturally as we can engage in our territorial and social games, we can also engage in a creative game, what I call the Game of the Gods, in which we can create new realities.



"This distinction has proven the significance of moving toward higher-stage cultures for improved productivity and wellbeing."

Tribal Leadership

"to become an authentic tribe leader it is necessary to understand the dynamics of organizational behavior and what it means to build high performance tribes or a thriving organization."

Again, let's dig deeper. In 2008 Dave Logan, Halee Fischer-Wright and John King published their book Tribal Leadership. From their research they were able to make additional distinctions that can be useful to explain our proposal.

They divided how work gets done in organizations in five cultural stages

In this five stages that go from Despairing Hostility (Stage 1) towards Innocent Wonderment (Stage 5). They found that regular people could very accurately diagnose the particular stage a tribe was displaying just by listening to the language they spoke and their behavior. In other words, each stage represented its own structure of coherence and values that also seem to be our natural response to a certain environment. If we look closely, the first three stages correspond very well to Jacob´s management of territories (or hierarchy) and the last two to the transactional (creative).

They found stages 2 and 3 to be the most prevalent in organizations

74%

Another important insight they discovered is that both productivity and wellbeing improved the further a culture moved from stage 1 to 5. However, most of management literature and education is directed towards improving traditional hierarchical organizations that are prevalent today, with limited success. Stages 2 and 3 require centralized planning and design, command and control, manipulation (extrinsic motivation at all levels), clear and uniform job descriptions and other characteristics that we will cover in the following pages.

There have also been attempts to work with stage 4 features within a stage 2-3 cultures but we get the impression that they feel empty, naïve and sometimes even hypocritical. A lot of today's organizations have a stage 4 vocabulary typically at the top management level and in their propaganda, but the language at the bottom is very different. The worst part is that this scheme just reaffirms to all stakeholders their ideas about the futility of making a stage 4 organization possible and to have doubts about the motivation behind all those involved.

In the following pages we will try to demonstrate why we consider our proposal to be a very robust attempt to provide a sound management system to organizations who want to transcend

5 Stages of Tribal Leadership



to a stable stage 4 culture that produces outstanding results. We also hope to provide a roadmap to move from their current stage to this destination. Logan, Fischer-Wright and King propose that, to move from one stage to the next, we need to work each individual and help him speak the language of his particular next stage. While accepting that this is true, we propose that we also need to work on two additional critical elements. One is to have a system where trust can flourish and the second is to have a system that challenges the individual to grow. Our proposal addresses all three elements.

"Tribal Leadership focuses on two things, and only two thongs: the woeds people use and the types of relation ships they form"

Logan, King and Fischer-Wright, 2008

PROS System

The most efficent method we know to get from purpose to action

Before we dive we would like to share that sometime ago we discovered that in order to have a healthy relationship and connection between our purpose and our everyday activities required that we take balanced approach among three variables: PROS diagram

- 1 Observer/ Person
- 2 Systems/culture
- 3 Results/outcomes

What it states is that purpose, our interpretation of what we need to do in order to take care of our and other 's needs, is the only end by itself, however each of us define it. It constitutes the foundation for human action and coordinated action. We act to take care of a need. Persons/Observers, Systems/Culture and Results/Outputs, the spheres below, are both ends and means in their own way. Let me explain, the interaction between Persons and Systems help us achieve better results; the interaction of Persons and Results helps us improve our systems; and finally, the interaction between Systems and Results can help each

person grow. That's not all. I propose that a focus on only one or two of the spheres below will go in detriment, not only of the other one or two, but to the organization's ability to energize its purpose and ultimately to the object of our focus itself.

Let us make some notes on the elements and then some implications.

PURPOSE

Our interpretation of purpose is very much in alignment with the ones given by systems thinkers. Let me quote Donella H. Meadows in her Thinking in Systems, "Purposes are deduced from behavior, not from rhetoric or stated goals" and "are not necessarily those intended by any single actor within the system". "An important function of almost every system is to ensure its own perpetuation" and therefore "one of the most frustrating aspects of systems is that the purposes of subunits may add up to an overall behavior that no one wants".

We also took into account in our interpretation of purpose the work done by Logan, King and Fischer-Wright in Tribal Leadership. For the standard organization which would be a mixture of cultural stage 2 and 3 tribes, the formal purpose articulated by an illuminated management team is a good start, but its influence on the day to day activities will be limited. Only when the tribal leader goes thru the process of taking his tribes to the next step of cultural stage 4, does a shared

vision and values begin to emerge and their impact on day to day activities goes to a new level.

OBSERVER/PERSON

We will introduce the concept of the observer when we talk about the importance of language and its relation with personal growth. We propose that it is language, more than reason, what explains our human condition. As such, we live in interpretative worlds. Therefore we do not know how thing are, we only know how we interpret them. This has huge implications since we shift our focus on the value of propositions from their truth to their power to enhance our capacity to act. Notice also the shift from things (focus on the observed) to our interactions with things (focus on the observer).

Every person in the organization should have the chance to be held accountable by fellow peers on his/her commitment to compromises, his execution of predictive variables, strategy and results among other things. Only then his peers can help the person see his blind spots and help him/her grow (and vice versa) and to take care of systems if needed. Only when we expose ourselves vulnerably to other observers whom we trust, can we achieve the transformational learning that we need to grow.

SYSTEMS/CULTURE

In rigor there are no systems in nature, there is only reality. The concept of a system emerges when an observer tries to understand certain phenomena for his own purpose. She also has to define the limits of the system he wants to study. While these distinctions can be very useful for us, it would be a mistake to think that these limits actually exist in nature. However, we agree with W. Edwards Deming affirmation that there is no system without a purpose.

RESULTS/OUTPUT

Regarding results and outputs there are also some distinctions that I would like to propose. The first is the distinctions of the results that are measurable and that we decide to measure and those that are not measurable or that we decide not to measure. Then we go deeper on the ones we decide to measure and introduce the concept of variation to distinguish between common caus-

es and special causes to determine the capacity of our system and also the type of action that we need to take depending on what we observe. We also take into account the fact there are results/ outputs that can affect other systems that are distant to ours and also our own system in the future.



The SOAR Model and The Incorporation of Action

The SOAR model from Ontology of Language.

Do you see what we have done here? We have taken the elements at the base of the PROS diagram, rearranged them, put action in the middle of everything and made additional connections. Allow me to explain the figure. It is read from left to right. The type of observer that we are at a certain moment determines our horizon of possibilities, in other words the actions that we see as open or closed for us, and the actions that we take, determine the results that we are able to achieve. There are many elements that constitute the particular type of observer that we are at the moment, but two of the most important are our judgments and our emotionality. The concept of the observer is the first of what we call the hidden conditionings of human action. We cannot see its influence until we learn the concept and its implications. However, once we understand them, our relationship with ourselves, others and the mystery of life changes to become more respectful, forgiving and curious.

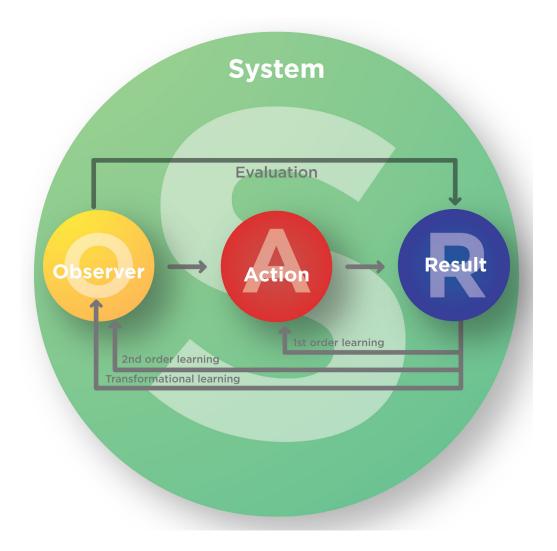
For example, when we want to design our future selves, we can also use the SOAR model. However we start from the right. First we determine what results we want to achieve, then we see what actions that we are not taking now we need to start taking (or to stop taking if we are now) to become a different observer than what we are right now. As we can see, our actions not only determine the results we achieve, it also helps us become different observers and ultimately the person we

become in the future. This is why we can propose that action is the defining factor of our existence.

Let us take a closer look at the connections.

There are arrows for evaluation and also for learning. As observers we can look at both the results that we were able to achieve, compare them to the expectations that we had, relate them to the actions that we took and from them, to generate new learnings that will help us in the future. We classify such learnings as first order (affecting our actions), second order learnings (that modify the type of observers that we are) and transformational learnings that changes us at a very deep level. The most important way to achieve transformational learning is to expose ourselves to other observers whom we trust. They can give us a fresh perspective to help us displace our observer.

The second hidden conditioning of human action is the System. We say hidden since often and unless we receive at least some training on the different social systems we participate in and how they influence our behavior, we only react to the forces they exert on us. Therefore, our capacity to act on them to change and redesign them becomes more limited. It is also true that a lot of times the



most important leverage points to change the capacity of our systems are not the most intuitive. We often underscore the importance of systems in our everyday life and forget the fact that we are social beings who are born into a community of language that teaches us how to relate to both our social and natural worlds. Such systems become transparent to us, like water to a fish, in such a way that we believe we see the world exactly as it is, forgetting the fact that it is only how we, as a community sees it.

"The SOAR model is very profound and powerful. Not only does it introduces us to the two very important hidden conditionants of human action and results, such as the observer and systems; it also explains their relationship to produce transformational learning"

Logan, King and Fischer-Wright, 2008

Holacracy

The most efficent method we know to get from purpose to action

We have been practitioners of Holacracy for many years and the more we have experienced it the more convinced we are that it is a very robust system for a company that wants to operate on a tribal leadership stage 4 culture. Most organizations try to develop "soft skills" in a traditional command and control structure with limited results. For a company to move from stage 3 to 4 requires a different kind of organization is needed, one where the role of hierarchy weights less and purpose driven autonomous teams weigh more in determining the results that the organization achieves. Holacracy does exactly that with a system that has been evolving over years of practice.

When we talked about systems we said that systems depend on the purpose and limits defined by an observer. Holacracy define both, along with each role's accountabilities, in order to organize the work of the organization. As a result it's dynamics create an environment that enables individual and coordinated action to be purpose focused, instead of the foreman focused actions that inevitably take place in a hierarchical organization.

Another idea that Holacracy has contributed to our proposal is the separation of role from person. The work is organized in roles and circles (a group of roles). The mechanism that Holacracy uses to take care of its systems (its organization) is thru Governance Meetings. This

mechanism allows the organization to grow organically since it constantly adapts to the gaps people feel from their actual capacity to energize its role's purpose and the realities they encounter every day. One of the most amazing side effects of this new vision is that conversations about our work are never personal since you are not tied to a title or job description. The same person can energize different roles in different circles (with different purposes, domains and accountabilities).

Holacracy is also an excellent action coordination platform. The clarity that comes from the governance structure and the actual circumstances that each person energizing roles faces in reality when energizing its purpose, generate what Holacratic practitioners call "tensions". Action coordination takes place in weekly tactical meetings where each circle, thru a structured triage process, define the actions to be taken during the week and define what projects the circle needs to take on in order to energize its purpose.

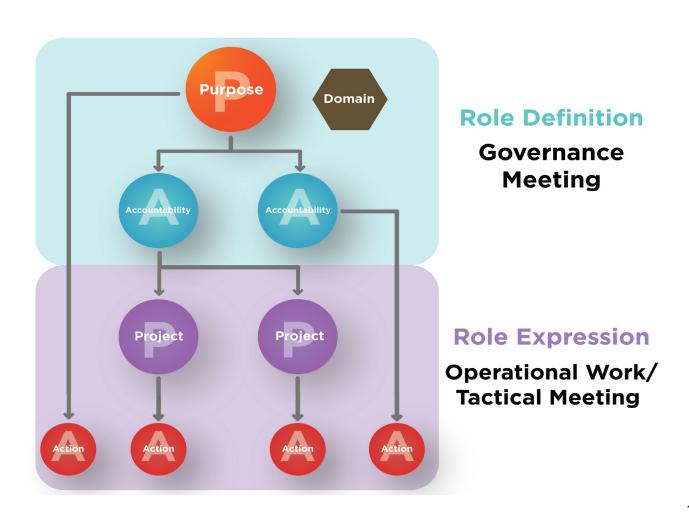
In summary, once we are clear on the system we are operating in, in other words we have a good enough definition of our purpose (how we plan to enrich other people's lives by taking care of their needs), our domains (the limits of our system) and our accountabilities of both our role(s) and our circle(s) we can go into the world and start acting to energize it. As we do that we

will face different circumstances in reality that will question our original assumptions and generate the tensions we need to address to move forward (see figure 3). We feel it a "stuff coming in", then we act or react on them and feel the "tensions" as described in the top part of the figure. Once we feel those tensions we have three possibilities. The first is to follow Holacracy 's golden rule which is: "To fulfill your role, you have the full authority to make any decision or take any action, as long as there's no rule against it" and just take the needed action. The second, if I have to coordinate actions with other roles is to process them thru a tactical meeting. Lastly, if it is something that is

not properly addressed by the organization and I think we should, I bring the issue to a Governance meeting to make sure that it does in the future. To conclude and to reiterate, as we saw on the SOAR Model before Action is the most fuel, not only to results, but also to become better observers and better persons. We become from our actions. And as we can see in figure 5 below, Holacracy is a very simple, yet powerful, system for people to naturally transform purpose into action. While it requires that we override some our much stronger "chimp" elements of our nature, it is also true that we can, just as naturally transform how we act to explode our "bee" elements.



"Holocracy is not a governance process 'of the people, by the people, for the people' - it is governance of the organization, through the people, for the purpose"



Our Hero's Journey Management System (OHMS):

MIND THE ROLE, GROW THE SOUL

OHMS is a revolutionary management system that centers on the individual, their soul, and their relationship with the community. It fosters personal growth through the generative power of language and meaningful conversations with different observers, leading to heightened sensitivity to tensions and opportunities over time. The three central characters in OHMS are the individual, their community, and language.

Conversations form the cornerstone of OHMS, offering insights into the culture and productivity of an organization. The journey often begins when individuals operate within a comfort zone, living transparently until an event catches their attention, signaling a call to adventure. Energizing OHMS starts with transitioning from purpose to a challenge closer to immediate actions needed to empower the purpose. Challenges may be chosen or arise unexpectedly, leading individuals to officially enter the first quadrant of OHMS. Two crucial declarations precede further progress:

"I want to" and "I think I can."

Moving into the clarity zone, individuals demonstrate their fit for the challenge. They are accountable for role, resources, and risks (3R's), equipped with early detection systems and evidence of managerial actions. These declarations underpin the first quadrant's energizing spirit. The outcomes are new agreements, providing clarity and information to support the purpose and challenge, fostering effective negotiations.

The second quadrant is pivotal, where action takes place and results are produced. Individuals define their priorities and agenda weekly, formulating hypotheses for the upcoming week. The formula StrategyPredictive VariablesExecution=Results guides them, emphasizing the need for a well-rounded approach to achieve desired outcomes. Reality often deviates from plans, requiring intuitive responses based on present circumstances.

The heart of this zone lies in the comparison between the hypothesis and actual execu-

tion, reflecting on learning opportunities, strategy effectiveness, and alignment with community expectations. The analysis occurs at two levels: action-oriented first-order learning and observer-level second-order and transformational learning. Regular cadence of these conversations cultivates trust and facilitates personal growth.

The Community Reflection Zone encompasses monthly reports to the community, promoting transparency and accountability. Constructive feedback energizes the purpose, systems, and personal development. This zone is vital for generating a daring culture of engaged feedback, essential for transformative change and avoiding disengagement.

In the next phase, Introspection, Learning, Innovation, and Creativity, conversations shift to a different perspective with a broader group of outside observers. This zone facilitates innovation, creativity, and learning, providing opportunities for reflection and strategic planning. Decisions regarding system adjustments are made at the final stage, determining the need for systemic issue processing, strategic shifts, competency development, or facing new challenges. OHMS offers a transformative journey, fostering a culture of trust, openness, and continuous learning, leading individuals and organizations to embrace vulnerability and flourish.

"OHMS is all about absulute and transparent individual accountability.

Therefore its three mai characters are the individual, his /her community and language" Humberto Suarez

Our Hero's Journey Management System (OHMS)

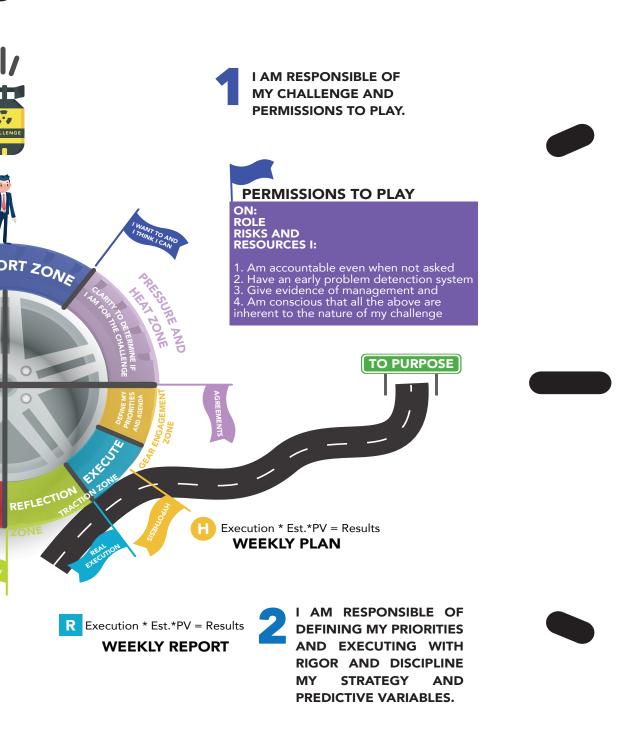


NOT TO EXECUTE

● How do I propose to honor what I did not include in my agenda?

I AM RESPONSIBLE OF MY EXECUTION AND MY RESULTS AND I HONOR THOSE AGREEMENTES I DID NOT KEEP.





Ontology of Language

"In and of itself, knowledge does not guarantee superior performance; conversations do. Only action can be productive. Conversation are action"

(Rafael Echeverria, 2004)

Rafael Echeverria says that in order to generate trust we need "a system and a culture that creates the conditions to encourage it" and "the performance of each element of the system and the competencies that they exhibit in their execution...this is supported by generic competencies that have to be learned and stimulated". We believe that the system we have presented with both Holacracy and OHMS addresses the first point. We propose that the Ontology of Language Philosophy does the same for the individual. We briefly present its three postulates and three principles to give an idea of how it does that.

The three postulates are that 1) we consider human beings as linguistic beings, 2) we interpret language as generative, and 3) we interpret that human beings create themselves within language and thru it.

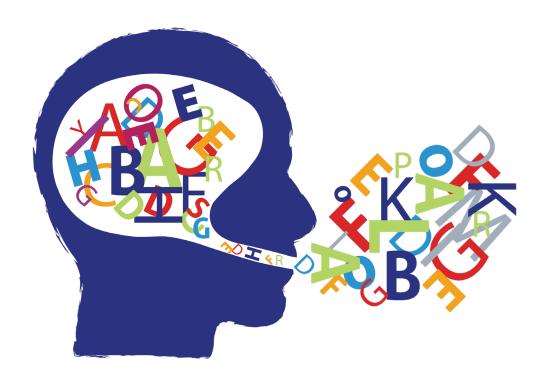
The three principles are: 1) We don't know how things are. We only know how we observe them or how we interpret them. We live in interpretative worlds. 2) We not only act in accordance to how we are (and we do), we also are in accordance to how we act. Action generates being. One becomes in accordance to what one does. And 3) Individuals act in accordance to the social systems to which they belong. But thru their actions, although conditioned by these social systems, they can change

such social systems.

From these postulates and principles we can draw certain powerful propositions that from our perspective provide a more powerful understanding of our human condition. For example, we shift the value of our propositions from their Truth to their Power to enhance our capacity to act. We also now consider language (thru our conversations) to be action, and therefore there are some generic competencies that we can learn to become more effective in our use of language to produce better results in all aspects of our life.

While we accept that a conversation involves not only language, but to a far greater dimension than we realize, also emotionality and our body, it is language that constitutes us as the particular being that we humans are. It is also thru language that we can give account of the other two. Therefore, regardless of the language we speak, we perform:





- **Affirmations** (Statements, Claims) which are acts where language conforms to reality.
- **Statements**(including judgments or assessments) which are acts where reality conforms to language.
- **Promises** which are the basic action coordination acts.

Promises are:

- **Offers** (plus a declaration of acceptance from another person)
- **Petitions** (plus a declaration of aceptance from another person)

The compromises that each individual assumes with her/his community in each of theseacts are different. There are other competencies for listening, inquiring and also in the domains of our emotions and bodies. Regardless, there are many reasons why learning generic competencies is such a fundamental and powerful endeavor we can take. First, hey don't become obsolete. For example, learning to actively listen will never be out of style. Second, they are the foundations of many specific abilities. For example, even if you receive the best sales training, if you have problems offering your-

self as a possibility to open a promise cycle, your results will be compromised. And third, they are useful in a wide range of areas of our life. For example, being able to distinguish when I am making a judgment (or an assessment) instead of an affirmation will serve me well both at work and home



Our Services

The most efficent method we know to get from purpose to action

Let us help you achieve the results you want and help you synergize and mobilize your employees to reach the highest levels of success. Our team building programs are based on science and balance the purpose of the projects and the company with the people who execute them. All of our team building programs are solidly grounded in practice and are based on the application of our ownstudies with effective business teams.

The combination of the four systemic approaches: Tribal Leadership, Holacracy, and Language Ontology (PROS and SOAR)have allowed us to develop our own systems such as our hero's journey, system which, when worked together, constitute a management system that generates results without resorting to any type of conditioning, but rather implies the full involvement of each individual to promote their learning within the development of their work.

- **Team building programs** we work hand with your teams to instill the principles and practices of effective collaboration and performance improvement in the workplace.
 - 26 weeks (6 months)
 - 12 weeks (3 months)

- Workshops Re-energize, balance and focus on harmonized goalsspecific two-hour workshops.
 - Specific two-hour workshops.
- **Personal Coaching** Provided by professional coaches to support individuals or teams
 - Per hour.
- 4 Facilitation Embrace resilience and growth as we help you uncover and address limitations, encouraging a proactive approach to system improvement. By understanding systemic archetypes, our facilitators will identify patterns and empower your leadership with meaningful insights.
 - Per hour.
 - Per project.

Testimonials

It is symply a better way to run an organization, Things are defined.explicity. there are no implicit expetations, and people are always aware of ehat the are accountable for, and the purpose of doing things "

Ognjen Nastic

"The tools that I had learned have been life changing in every aspect of my life. I have better relashionships with my family, co-workers and even with myself. Very thanful for this knowledge"

Neftali Calderon

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"The most importat thing for has been the discovery that I can chart new routes with the confidence that I have the tools that I will need to lead myself and athers along the way"

Mauricio Morales

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