



Holacracy: The New Management System for a Rapidly Changing World

Brian J. Robertson

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Holacracy is a revolutionary management system that redefines management and turns everyone into a leader.

Holacracy distributes authority and decision-making throughout an organization, and defines people not by hierarchy and titles, but by roles. Holacracy creates organizations that are fast, agile, and that succeed by pursuing their purpose, not following a dated and artificial plan.

This isn't anarchy – it's quite the opposite. When you start to follow Holacracy, you learn to create new structures and ways of making decisions that empower the people who know the most about the work you do: your frontline colleagues.

Some of the many champions of Holacracy include Tony Hsieh, CEO of Zappos.com (author of the #1 *New York Times* bestseller *Delivering Happiness*), Evan Williams (co-founder of Blogger, Twitter, and Medium), and David Allen.

Holacracy: The New Management System for a Rapidly Changing World Details

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From Reader Review Holacracy: The New Management System for a Rapidly Changing World for online ebook

Olivier Compagne says

This book does a great job at showcasing Holacracy, a new management system that distributes authority and accountability throughout an organization, instead of relying on managers to guide employees. What makes this book successful is that it includes both the "why" and the "how to" use Holacracy, all in a digestible read.

An aspect of Holacracy dear to me is that unlike current discourse on the matter, it doesn't put employees' and companies' interests back to back. Instead it proposes a system in which both personal autonomy and a fierce focus on the company's success are part of the same equation.

After years of hearing about Holacracy and reading bits and pieces about this rich model here and there, I can't recommend this book enough for anyone who wants the full story in one package.

Disclaimer: I work with HolacracyOne, the company developing the Holacracy model.

Jan Höglund says

Holacracy® is a governance system and a registered trademark owned by HolacracyOne. The word Holacracy is very easy to confuse with holocracy (with an o), which means universal democracy. Robertson's aim with the system is to *"harness the tremendous sensing power of the human consciousness available to our organizations"* (p. 7). This harnessing is done by *"a set of core rules"* (p. 12). The Holacracy constitution acts as *"the core rule book for the organization"* (p. 21). Robertson hopes that his readers will approach the book *"not as a set of ideas, principles, or philosophies, but as a guide to a new practice"* (pp. 13—14).

Brian Robertson's book is very readable and informative. I share Robertson's view on the problems associated with *"predict and control"* (p. 7) and his interest in finding *"better ways to work together"* (p. 12), but I can also see problems with heavily rule based approaches. I think there's a fundamental difference between following rules and honoring agreements. Rules are externally-focused, while agreements are internal because they are directly linked to will. Agreements, not rules, are the glue that ties commitment to results.

Brian Robertson focuses on practices in his book, while my interest primarily is on principles. This doesn't mean that I think practices are unimportant. I share, however, Ralph Waldo Emerson's view that *"The man who grasps principles can successfully select his own methods. The man who tries methods, ignoring principles, is sure to have trouble."* To paraphrase Emerson, the man who focus on rules and processes, ignoring principles, is sure to have trouble. I also think that processes need to grow, or evolve, from their specific context. Each situation is unique in some way, small or large.

For Brian Robertson, it's very important to *"prevent others from claiming power over you"* (p. 21). This is done by establishing a *"core authority structure"* and *"a system that empowers everyone"* (p. 21). The power is in the *"process, which is defined in detail"* (p. 21). For me, *"harnessing true self-organization and agility throughout an enterprise"* (p. 20) is an oxymoron, a contradiction in terms. Harnessing self-organization might actually kill it. I suspect people might decide to withdraw their engagement if they realize that they are

harnessed for the benefit of the organization only.

Brian Robertson defines a "circle", not as a group of people, but as a "group of roles" (p. 48). The "basic circle structure" consists of nested circles (p. 47). Robertson calls the hierarchy of "nested circles" a "holarchy" (p. 46). Arthur Koestler defines a "holon" as "a whole that is a part of a larger whole" and a "holarchy" as "the connection between holons" (p. 38). I'd challenge that a hierarchy of nested circles really is a holarchy. A person certainly is a holon, but I doubt that a role, in itself, is a holon. What inherent "wholeness" does a role have if people are needed to "energize" the role and "enact" its accountabilities (p. 43)? Having said that, I do think that a group of people can become and act as a holon under certain circumstances. Maybe Bohmian Dialogue, the U-process, and Open Space Technology are examples when such circumstances can occur?

The nested circles in the basic circle structure are "linked via two special roles", the Lead and Rep Links (p. 49). The idea behind this interlinking of circles comes from the Sociocratic Circle Organization Method (Sociocracy), which was invented by Gerard Endenburg in the 1970s. Brian Robertson tried to patent the idea (Pub. No. US2009/006113 A1, Fig. 4), but subsequently abandoned the patent application. Other ideas in the patent application similar to Sociocracy are the decision-making (Fig. 6), governance meeting (Fig. 8), and role election (Fig. 9) processes. A significant difference between Sociocracy and Holacracy is that all roles are elected in Sociocracy, while only the Rep Link, Facilitator, and Secretary are elected roles in Holacracy (p. 57). Holacracy is also more prescriptive. The responsibility of people in a Holacracy is to act as role fillers. This is a "sacred duty" and "an act of love and service, not for your own sake, but nonetheless of your own free will" (p. 85). Holacracy "empowers you to use your own best judgment to energize your role and do your work" (p. 97). I cannot help but wonder why people can't empower themselves? Why do you need the permission of a system to use your own best judgment in your work?

In addition to the "basic responsibility as role fillers", people also have specific duties in "offering transparency", "processing requests", and "accepting certain rules of prioritization" (p. 92). Transparency and effectiveness are important in Sociocracy too. However, equivalence doesn't seem to be as important in Holacracy as in Sociocracy. In Holacracy, "the process is all that matters, and the process will take care of everything else" (p. 111). The rules in Holacracy "create a sacred space that frees each of us to act as sensors for the organization, without drama getting in the way" (p. 110). "As long as the process is honored, you really don't care how anyone feels — at least not in your role as facilitator." (p. 110) I ask myself, aren't feelings important if people are going to be able to act as sensors? The answer Brian Robertson gives is that "it's about processing tensions for the sake of our roles, which ultimately serve the organization's purpose" (p. 113). "This keeps the organization from being overly influenced by individual feelings and opinions that are not relevant to the work ..." (p. 116). He assures that "No one's voice is silenced, yet egos aren't allowed to dominate." (p. 117) Well, really? Yes, says Robertson. Holacracy seeks to "process every tension and be truly integrative; it's also a recipe for [not] letting ego, fear, or groupthink hinder the organization's purpose" (p. 125). "Playing politics loses its utility ..." (p. 126). I think that the politics of identifying issues and building support that is strong enough to result in action will always be there. It's great if the politics can be channeled through Holacracy. If not, it will go underground.

One of Brian Robertson's "favorite metaphors" used to illustrate the "dynamic steering" and "constant weaving" is riding a bicycle (p. 129). Interestingly, this is the same metaphor which Gerard Endenburg uses to illustrate the circle process in Sociocracy. (References: G. Endenburg, *Sociocracy: The organization of decision-making*, pp. 16—18; and G. Endenburg, *Sociocracy: As Social Design*, pp. 67—71). Robertson explains that "Dynamic steering means constant adjustment in light of real feedback, which makes for a more organic and emergent path." (p. 129) Dynamic steering done well "enables the organization and those within it to stay present and act decisively on whatever arises day to day ..." (p. 130). The focus is on "quickly reaching a workable decision and then let reality inform the next step" (p. 131). As in Sociocracy, "any decision can be revisited at any time" (p. 131). I think the dynamic steering is a major strength of both Holacracy and Sociocracy.

Holacracy defines the organization as *"an entity that exists beyond the people, with its own purpose to enact and with work to do beyond just serving the people doing that work"* (p. 148). This is also why Holacracy isn't a governance process *"of the people, by the people, for the people"*, but *"of the organization, through the people, for the purpose"* (p. 34). Holacracy differentiates *"between the human community and the organizational entity"* (p. 149) and between the *"role and soul"* (pp. 42—46). To summarize, *"Holacracy's systems and processes are about continually helping the organization find its own unique identity and structure to do its work in the world, while protecting it from human agendas, egos, and politics."* (p. 199). Still, the organization needs human beings to energize and enact all its roles.

Holacracy is *"a big shift"* (p. 145). Brian Robertson emphasizes that *"you can't really practice Holacracy by adopting only part of the rules"*, but *"you can take on all of the rules in only part of the company"* (p. 147). Holacracy isn't for everyone. Robertson has *"seen organizations where it just didn't stick"* (p. 167). The three most common scenarios he has identified are *"The Reluctant-to-Let-Go Leader"*, *"The Uncooperative Middle"*, and *"The Stopping-Short Syndrome"* (p. 167). The last scenario is *"perhaps the most insidious"* (p. 170) because *"slowly and almost imperceptibly, the change starts to fade"* (p. 170). At best the organization ends up with *"a surface level improvement"* only (p. 171). I don't think this is a scenario unique to Holacracy. Regardless, Robertson claims that *"a majority"* of the Holacracy implementations he has witnessed seems to result in *"lasting transformation"* (p. 173).

Brian Robertson acknowledges at the end of the book that he is grateful to his mother for her great job in catalyzing the development of his *"strong and healthy ego"* (p. 211). Robertson writes that he has a *"solid sense of self throughout"* (p. 211). Unless he hadn't had such a strong and healthy ego, he *"wouldn't have needed a system capable of protecting others from it"* (p. 212). To me, this sounds contradictory. I can understand if a person with a weak ego seeks protection in rules, but not why others would need protection from a person with a solid self and healthy ego. Maybe there are some deeply human needs behind Brian Robertson's birthing of Holacracy? For one reason or another, Robertson perceives a need for a strong rule based system. It's up to you to decide if you need such a system too! If so, it's called Holacracy®.

Adi says

The concept is interesting, the presentation of the concept of Holacracy is detailed, but unfortunately not exciting enough. I was dragging myself through the chapters. It is clearly an important experiment and step towards new ways of working together as opposed to working for and under/over, etc. I need to experience Holacracy for giving it a fair review. On paper it appears to be a replacement of old structures that were becoming inefficient and rather an obstacle with a new structure that promises more efficiency through better procedures, rules and governance. It sounds all meaningful, yet also very clean and procedural. I am missing the human stories in this book. What about conflicts and chaos? How about employees that get stuck in this new concept? What are the human challenges when one is liberated within this working environment and still stuck in the old paradigm outside of work? How do people deal with this paradox?

Guillaume Belanger says

I read this book because it was discussed in Reinventing Organizations as a complete system for running things under self-organising principles. Unlike Reinventing Organizations, this book is not intended to be an inspirational guide, at least I don't think so. Instead, it is meant to present the management system that is Holacracy, walk us through its elements, its processes, its systems, and help us in deciding if we want to

adopt it. The great advantage of adopting this management system is that it is fully developed, tried, tested, and mature. Attempting to redo this from scratch, I think, would be ludicrous. Then again, some aspects of the system may not be appealing to some.

In essence, it is a management system that replaces the traditional tree-like hierarchical structure that is so limiting and stifling, by a network of roles and circles of connected roles that continuously evolve under the natural forces at play in the organisation. Roles have specific authorities and accountabilities, and have full control and authority of them. Circles also have specific authorities and accountabilities, and have connections to the parent or sibling circles through links. Everything is stirred through two types of meetings: tactical meetings for processes and operations, and governance meetings to discuss, evolve and change roles and accountabilities. All tensions are processed during meetings, and nothing that needs to be dealt with is left out either on purpose or accidentally. The system itself, regardless of the individuals involved, makes sure of that.

The most important strengths of the system are that it is evolutionary, and focused on the organisation and its purpose; not on people, likes and dislikes, egos and insecurities. Through this focus, every person filling every role is allowed the freedom and creativity to do whatever they can think of to further the organisation's purpose. This makes people owners of their accountabilities, and the evolutionary nature of the dynamic process allows them to grow, develop their skills, and evolve into different roles to which they are either more suited or in which they feel more useful and fulfilled. It does, to me, seem very appealing as a management system in which people can learn to fully express themselves and mature into autonomous, productive, creative, fulfilled free-thinkers, no matter what their roles and accountabilities are.

Derk Geus says

It is well written and persuasive. It is also a dangerous management system that can undermine a company, as it did with mine when we tried to implement it. It nearly brought us down.

My takeaway is that there is no system that can replace solid leadership. If you're the CEO, you need to own it and get to work. It's super tempting to abdicate responsibility but it is simply the wrong path to take.

Yes, people make mistakes, but applying a straightjacket for decision making process is not the answer. The answer is reflection, continuous improvement, clear roles, and autonomy.

Yes, signals might get lost, but the answer is not allowing all the noise to go through the same process. The answer is to cultivate better signalling and better filters to reduce the noise.

Yes, we sometimes get lost in endless debate, but the answer is not to force decisions. The answer is to take ownership as the leader to make sensible decisions.

Yes, people need authority in their role. But the answer is not to formalize this to a degree that even governments would find cumbersome. The answer is to define the role, create space within that role for authority and accountability, and to keep monitoring performance.

Instead of this book, consider the following:

- High Output Management by Andrew Grove
- Turn The Ship Around by L. David Marquet
- Extreme Ownership by Jocko Willink and Leif Babin

Good luck! :)

Alejandro Perez says

This book has some pretty advanced and innovative concepts for running a business. Lots of great ideas to get and implement in the business before making a final call as to moving into this new operating philosophy!

Richard Newton says

I started this book expecting to hate it, but I actually enjoyed it. (It's a good question why I would read a book I expected to hate, but that's another topic!). It's probably the cover which I found off putting which makes the book look like another over-confident, but basically vacuous business nonsense. In reality this is a well thought through and genuinely innovative set of thinking about organizations. It is also well written, being an easy read, which is a good trick to pull off for novel ideas.

To some extent the tone of the book reminded me of some of the writing on Agile, and also a little of Goldratt's theory of constraints - not that there is any direct comparison. The similarity was in Robertson's idea of tensions, which reminded me of Goldratt's focus on constraints.

So, great - worth reading and interesting. Will it work? Frankly, I don't know. Most of the organizations involved are fairly small. Some of the organizations I work with have more people in support functions like procurement, than many of the organizations mentioned here employ in totality. Also many of the organizations are relatively new, and I would be interested in the change impact of trying to implement this in a long established business culture. But that is not a reason to reject the thinking. It's just a reason to be a little careful. After all we all know there's a lot wrong with many organizations and the way Robertson looks at these challenges is insightful. To be fair to Robertson, he treats the subject with realism and pragmatism, accepting that implementing a Holacracy is not always an easy ride.

Does that mean I liked everything? No. There were a few niggles. For example, I don't like the analogy Robertson uses of a new organization being like a new operating system - but that is probably just a personal thing.

What most irritated me will probably seem like a pedantic point. Robertson keeps talking about focusing on the goals of the organization, not the goals of people in it. Sorry, but organizations don't have goals, for the simple reason that an organization is not the sort of entity that can have a goal, any more than it can have a relationship, like music or enjoy hamburgers. Well, not unless you have a very different view of the nature of organizations from me. I am not trying to make an obscure metaphysical point. I think it is important that we don't try and envisage organizations as something they are not. And Robertson's continual stress that the organizational goal is something different from the goals of the people in it or any of its stakeholders kept making me think - so what is this entity that has its own goals?

However, I don't think this spoils the book and may well say more about my way of thinking than weaknesses in Robertson's.

Jurgen Appelo says

A process-heavy straightjacket for organizations that can't figure out how to delegate the rules of communication.

Jason Dunn says

I love the idea of roles, along with their responsibilities and accountabilities, versus job titles. My criticism of circles is that they are just another way to draw a tree hierarchy. (Try and see). The "lead link" is still a supervisor role despite what the Holacracy training states.

I'd like to see this in action somewhere.

Bjoern Rochel says

Many good ideas, but for my taste too extreme and too process heavy. I like the idea of circles and roles and how autonomy and accountability is shifted. I also appreciate the separation of meta level from the operations.

What I have a hard time with is imagining adults liking being put into a strict process straightjacket. I just don't think that process alone will magically cure all problems of modern organizations.

Holacracy feels to me like its to teal organization what Scrum is for Agile.

Overall a decent 3.5

Sebastian Gebski says

Before I start - I don't think I'm able to properly review this book with reviewing the concept of Holacracy itself. It's technically possible, but it doesn't make (IMHO) much sense.

The overall concept of Holacracy (to replace inefficient & troublesome mgmt hierarchies with system of nested circles governed by process itself) sounds very crazy, but actually the 'city metaphore' made me give it a deeper thought. Anyway even if I agree with many statements, even if I've made plenty of bookmarks & got inspired to write at least few blog posts, I think that YES, Holacracy may work but only if you start it from scratch of within a really small company. And author did literally nothing to convince me I'm wrong - he's quite good in presenting the pros of Holacracy, but there's barely any mention of potential risks that can happen:

- * decision paralysis within governance process
 - * gaps in processes in context of contradicting positions of circle's members
 - * potential slowness of decision making progress ("VETOers")
- etc.

What did I like most?

* short idea about dealing with compensation in Holacracy-powered org (sadly, there should be many more ideas about adapting traditional enterprise mechanics into "flat world", but they are not here)

* some VERY good points about empowerment in different work scenarios

Anyway, I think that if you're interested in management, you should definitely read this book. Not necessarily because it's that good or because everybody will be doing Holacracy by next Tuesday - but just to make your own opinion on this interesting topic.

Serge Boucher says

More or less Getting Things Done for organisations. Worth reading.

Jyri-Matti Lähteenmäki says

First part had great thoughts and a nice vibe. But the second part was mainly about organizing meetings, which I consider a separate subject. The third part felt like a desperate attempt to make anyone atleast try holacracy.

Read the first part and pick the good stuff.

Emma Sea says

Holacracy is a system for structuring a business through "peer-to-peer self-organization and distributed control," in which "we all get to be adults together."

okay, so 1) Holacracy doesn't stand up under Marxian analysis. Power is not actually being distributed when workers are still selling their labor and the value of their efforts is taken as profit by the business owner.

2) Holacracy is designed for the perfect rational human, without personality, relationships, or ego. It is deliberately designed to create, "a healthy separation" between the personal/interpersonal, and the organization. Robertson considers this "a deeper honoring of the personal," by keeping it entirely out of the workplace. I mean, sure, props for being open and honest about the neoliberal wish to erase the messy realities of human behavior and human needs. The Holacracy is only concerned with the relationship between roles. It is literally designed to make people into perfect replaceable cogs.

Under Holacracy, how two people might communicate is "as unregulated as possible." In this way "Holacracy allows the organization to functionally optimally *however we humans decide to relate to one another personally* . . . it keeps human values out of the organizational space." (italics in the original).

You know what we get when human interaction is unregulated and only the roles in a business matter? We get Fox News and The Chicago PD. This is what you get when only results count.

"The organization" is now an entity in its own right - and specifically, it's a capitalist entity. It's not an organization of *people*. Humans are merely another resource to be juiced for capital. This isn't anything new, but celebrating it like this is extraordinary. And Robertson seriously is celebrating.

"When the David Allen Company was going through this transition [to Holacracy], many of the people within were struggling with the shift to a more impersonal approach. They'd worked hard for years to build a very close, warm, intimate culture, and you could feel it the minute you walked into their building. It seemed like a great place to work, where people trusted each other, listened to each other, and shared a deep connection. In the process of installing Holacracy, we were deliberately tearing out that carefully woven fabric of relationships from the way people did their work, and many people found the change quite jarring. But Holacracy wasn't removing all of their hard-won connectedness and trust, just moving it into a different space and liberating it from organizational matters." (p. 199)

Yeah, the employees could be as trusting and empathic as they liked, as long as it was out of business hours.

How frustrating that humans are humans 24/7. In a perfect Neoliberal world we would turn that off while we were at our desks, and only switch it back on in time to buy consumer goods and binge watch Netflix to hide our existential sorrow. Holacracy offers a plan to minimize the evidence of humanity in the workplace. All hail Holacracy.

Michal Wesolowski says

A great example of how self-managing organizations can work successfully. As a person interested in particular in practical implementations, over theoretical possibilities, I found the book a great combination of both. Even if Holacracy does not fit your organization, I recommend the book to everyone who believe in the idea of self-managing organizations.
