Table of Contents

Liberating Organizations – Table of Contents

Preface

The drive to write this book derives from observing the sad state of engagement in organizations and the consequential sub-optimal value generation. This was combined with a growing awareness of the basic human need for freedom to choose, grow, and contribute and the apparent disconnect with organizational practices. The case for freedom has not been forgotten, but it seems to be sitting on a shelf, gathering dust amid the current public discussion about leadership and organizations. It is a puzzle that most people support democratic government at the national level, but accept autocratic rule in organizations without batting an eyelid, and even hail the imperial CEO. Yet the promises of organizations that create freedom for their people are the same as those of societies. Creativity, innovation, engagement, trust, and taking responsibility will grow if there is freedom. The potential upside is huge. W. Edwards Deming[1] became a major inspiration:

> *A leader's job is to understand his people, understand their differences; optimize their interactions, their educations, their experiences.*
> *– W. Edwards Deming at Western Connecticut State University, 1990*

So what is the reason for this sad state? Is it bad management? Are people just slacking off? Is it a chicken-and-egg situation, where we cannot tell what came first? Or is it just too hard to introduce and live in freedom?

It started to look a bit like a criminal case. The case appears to have gone cold despite the glaring evidence of wholesale organizational dysfunction due to power abuse, rampant bureaucracy, and quiet quitting. It may not yet be a lost cause, but it seems we are living in a post-freedom culture, claiming to be free but succumbing to an elite authority of the heroic or bureaucratic kind.

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1   W. Edwards Deming: https://en.wikipedia.org/wiki/W._Edwards_Deming

Alternatively, some hold counter-elite authoritarian values with an absolute focus on victims in the so-called cancel culture, which is somewhat irrationally coupled with a claim to absolute individual freedom to be what they want, when they want it – an expressive individualism.

Together these trends limit civil co-existence and foster greater polarization and less engagement with others. This book offers a perspective to change that.

The book is mostly for people working in organizations with complex challenges. It is mostly applicable to organizations with more than a few people and a significant amount of complex knowledge work. We do not address pure production environments or other predictable domains, there is already an abundance of Lean frameworks and practices for these.

The material for this book has been amassed over many years, starting in 2005 when, while working as a system designer and coach, I stumbled upon Scrum. I got excited about this new approach to getting work done using self-governing teams, as opposed to the classic top-down command and control model. I became a Certified Scrum Trainer in 2008 and have worked in this capacity ever since, training and certifying several thousand people inside numerous and diverse organizational firewalls.

The original idea was to publish about Scrum and other agile methodologies in my native Danish language. The conclusion was reached that there was little need and I ended up writing an extended whitepaper *Scrum - a Bird's Eye View* that has served a lot of people.

Time passed and unfolding circumstances called for new directions. Early on, we dealt mostly with software or product development teams focused on getting a good job done. Development teams are well accustomed to teamwork and communication so we touched mainly on the professional aspects of *What* to do, *How* to do it, and *When* to do it. In short, it was all about the tactical aspects – very factual.

We started talking more to Product Owners and leaders, addressing the more strategic aspects of the *Who* and the *Why* of the jobs at hand. We were moving into the value systems of individuals and organizations. That led to a greater need for written material to cover the whole gamut of initiatives and projects, often referred to as *The four Ws – Why, Who, What, and When*. Sometimes when encountering a need for teams to delegate work to suppliers internal or external, there is a fifth W – the *Where*.

Based on this I – together with a group of Scandinavian, Central European, and American trainers and coaches – started discussing how to apply the agile principles and lean thinking throughout the whole organization. This eventually became the Agile Lean Leadership framework that is presented here.

The group shared a passion for impacting the organizational culture and creating more value from its efforts. By then many things had happened, horizons were broadened, and Scrum was just one of the several ways an organization could become agile or even in the broader perspective, be lean. Together we saw how Scrum and Agile worked well beyond their original home turf of software projects and product development and that all sorts of organizations could benefit. The operative term became *Scaling Agility and Lean Out* in the organization.

Many have dealt with *Scaling Up* agile implementations to handle large projects; frameworks abound for that purpose. We were more concerned with *Scaling Out* the fundamental agile patterns found in Lean and Scrum into every corner of the organization, reaping the benefits that we so clearly had seen in projects and product development at the team level.

At the same time, the exercise of *Scaling Out* also led us to investigate the framework's applicability at a deeper level, to areas that are not pure knowledge work. In the general organization, there are many physical boundaries and constraints, it is not all in your head; there needs to be solutions for those circumstances as well.

There was also this new realization about the connection with complexity, something the original Scrum and agile principles didn't touch on much. It was always there, covered in statements about uncertainty and empirical process control, but not specified otherwise. We became inspired by Dave Snowden[2] and his Cynefin framework.

The fathers of Scrum (Ken Schwaber[3] and Jeff Sutherland[4]) with their military background said: "*Scrum is good! It works! Do it!*". That is of course a great argument, but then Dave Snowden came along and said: "*Now, let me tell you why it works!*".

We gradually became aware that for an organization to become the best it can be, its people have to engage voluntarily, by being free to choose. Innovation requires engagement, which in turn requires freedom – only this way can an organization be consistently resilient.

When used in the context of organizations, Freedom means freedom from micro-management, exploitation, and abuse by autocratic superiors. But more importantly, it means the freedom to act, while being responsible to the team and the wider organization. It means having the mandate to be the best you can be, to engage, and to be respected as an independent individual. In our modern world, the concept of freedom is often understood as only the first part, freedom from constraints, which is not enough to build a civil society or a constitutional organization based on honoring mutual commitments.

Gradually Agile Lean Leadership emerged through experimentation and theoretical study as a complete framework for *Scaling Out* Agile principles and Lean into the organization, providing the basis for people's engagement, and handling situations above and beyond pure software or product development. The conclusion was clear: There is a real need for a

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2   Dave Snowden: https://en.wikipedia.org/wiki/Dave_Snowden and his Cynefin framework: https://en.wikipedia.org/wiki/Cynefin_framework

3   Ken Schwaber: https://en.wikipedia.org/wiki/Ken_Schwaber

4   Jeff Sutherland: https://en.wikipedia.org/wiki/Jeff_Sutherland

simple framework on which to build an organization, enabling it to deal with complexity in a sustainable and resilient way.

We decided to call the framework Agile Lean Leadership because Agile and Lean were the main tributaries to the stream. However, none of the original concepts present a real vision for the whole organization. Agile frameworks (e.g. Scrum and Kanban) are mostly focused on teams and getting things done, which is good. Lean is focused on value streams and removing waste, which is also good. The Agile Lean Leadership framework aims to expand this further out in the organization. It is about leadership, collaboration, and how value creation, initiative, responsibility, authority, decision-making processes, and exception handling operate in an organization honoring Agile and Lean values.

The Personal Touch

There is a personal perspective on the book as well. A while back I had an accident while playing soccer with my grandchildren, my knee snapped and I was carried from the battlefield by men in white coats. After several failed operations and lots of internal bleeding, the situation ended quite dramatically with experts wanting to amputate my leg. A surgeon at the local hospital defied the experts, pulled me back from the university hospital, and in the end saved my leg after a 3-4 hour long procedure performed by two surgeons.

This was not the only small miracle. A long stay at the hospital followed and my experience with the orthopedic facility was overwhelmingly positive. The collaboration between doctors and nurses, seniors and trainees, and day and night shifts was impressive, a spirit of psychological safety hovered over the place and the patients benefited from the service. There was no traditional hierarchy lording over the underlings with fear and intimidation, instead a general serving attitude dominated.

I was allowed to conduct Amy Edmondson's[5] survey of psychological safety and as expected the score was extremely high; one statement scored higher than anything else "*It is very easy to get help here*". The whole situation resulted in positive articles in the press instead of the usual complaints about the healthcare system.

It was a collection of extraordinarily ordinary people, who created extraordinary results because they were free to engage, take responsibility, and do the right thing. It gave me a direct understanding of what can happen when good people are given the mandate to operate as free agents instead of always being told what to do.

I believe this is true in every domain, and getting these practices and their background documented became almost an obsession for me, hence this humble volume.

Encounters en Route

During my and the group's journey, we have encountered many who share our goal, but there is also strong opposition from those who subscribe to traditional *Neo-Taylorist* management. It is clear that this line of thinking is a true anti-pattern to all things Agile and Lean. The Neo-Taylorist approach separates thinking and doing, echoing F. Winslow Taylor's[6] century-old concept of management based purely on numbers and KPIs; numerical efficiency above all else, and a reverence for the expert and the imperial leader. In reviving the Cold Case for freedom, Neo-Taylorism is the main antagonist.

Unfortunately, I found a perfect reference implementation of Neo-Taylorism in our Danish public sector's *New Public Management*. Neo-Taylorism almost always goes hand in hand with the classic hierarchical power structure inducing people to be primarily motivated by moving up

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5   Amy Edmondson: https://en.wikipedia.org/wiki/Amy_Edmondson and https://amycedmondson.com/

6   Frederick Winslow Taylor: https://en.wikipedia.org/wiki/Frederick_Winslow_Taylor

the power ladder because that is where the freedom, power, money, and perks are.

One book that has made a huge impact completely outside the Agile and Lean domain is, *The Puritan Gift* by the Hopper brothers. It outlines the history of American management from the late nineteenth century to the beginning of the twenty-first. The main thrust of the book is how the rather enlightened management style from the beginning of the twentieth century got distorted after WWII and replaced around 1970 with Neo-Taylorist concepts of imperial leaders, and financial or legal wizards. The pendulum is now apparently swinging back in some companies and organizations, but most of the world is still drifting in a top-down plan-driven direction, whether of the socialist or the capitalist observance.

But there were also really encouraging discoveries, like the research into the importance of teams in complex learning organizations, psychological safety, and intrinsic motivation. From our perspective, W. Edwards Deming is a central figure. His work was key to the American war production of WWII and to the rebirth of Japanese industry from about 1950 to 1970. In his later years from around 1980 to 1993, he tried tirelessly to persuade American business leaders to adopt a better way of leadership. A lot of what we do is founded on Deming's work.

Another important contributor is *Beyond Budgeting,* whose values and goals of Agile Lean Leadership. In many cases, a combination of Beyond Budgeting and Agile Lean Leadership could be the best organizational improvement strategy – creating a pincer movement. Several others will be mentioned in the following chapters.

Then there is a host of other people, who have observed and described the same need for all these positive traits of engagement, respect, self-management, etc. all summed up in the concept of freedom for people. There

are also many examples of organizations that have created such an environment, some examples are 100 years old[7]. It is not new as shall be seen.

Finally, recent developments on the geo-political scene have highlighted some fundamental observations of root causes. Freedom or autonomy of the individual in an organization is probably the deepest of all determinants of performance, well-being, resilience, and sustainability to be found. However, not many of those with views on leadership seem to talk or write much about freedom as such. A couple of notable exceptions are professors Bård Kuvaas[8] and Anders Dysvik[9] from Oslo BI and Traci Fenton[10] from Worldblue. Many people want the effect, and the engagement, and walk carefully around the subject, but few tackle it head-on and implement practices that support it.

The war in Ukraine which started in 2022 is about freedom and those who want to take it away from the Ukrainians. In his 2024 book *On Freedom*, Professor Timothy Snyder[11] from Yale highlights the situation. It is a remarkable book that, although speaking about national and global issues, is also relevant to organizations. His analysis of why individual freedom is instrumental to all positive community development resonates with our findings in organizations. Freedom is not just freedom from constraints and outright oppression, it is also freedom to choose, contribute, and become the best possible version of yourself.

Although we have amassed quite a lot of experience during the last 20+ years, there is only so much perspective that can be gained in a lifetime. I therefore embarked on a series of interviews to collect other people's per-

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7   One of the marquee companies in this space is W. L. Gore (https://en.wikipedia.org/wiki/W._L._Gore_%26_Associates), their idea of the organization came from Bill Gore's experience in the DuPont taskforces originating in the 1920s

8   Bård Kuvaas: https://www.bi.no/om-bi/ansatte/institutt-for-ledelse-og-organisasjon/bard-kuvaas/

9   Anders Dysvik: https://www.bi.edu/about-bi/employees/department-of-leadership-and-organizational-behaviour/anders-dysvik/

10   Traci Fenton: https://www.worldblu.com/about

11   Timothy Snyder: https://timothysnyder.org/

spectives. This was very enlightening and sometimes totally surprising. People from all sorts of backgrounds were interviewed, which influenced the flow of the book quite a lot, the findings are documented in Appendix *A - Summary of Interviews*.

Returning to the case for freedom, yes, it is still there on the shelf, but it is mostly gathering dust, and no active investigation on how to solve the conundrum is happening. This provided the final push to give the book its present shape and form plus its title: *Liberating Organizations – Building the Case for Freedom*.

Why and Who

This book is written to give readers sufficient facts, arguments, strategies, and tools so that they can investigate for themselves. If they find the facts substantial and plausible, they can then embark on a journey of organizational improvement and reverse the tide of Neo-Taylorism – especially the present-day focus on hierarchy and power. We want to help people and organizations to:

- Create more value out of their efforts for all parties involved, customers, employees, stakeholders, and society at large.
- Develop resilience and sustainability also in relationships.
- Reintroduce respect for people, so that they can choose to engage, thrive, and have pride of workmanship.

At the center is the concept of freedom. None of these objectives will be accomplished if people are not free to volunteer and choose to engage. It is not sustainable if people don't want it, we cannot just program it. Like societies, organizations can only be resilient and innovative if there is freedom for the people to speak up, choose, and act, it cannot be coerced from the top.

> *Freedom without the restraints of responsibility is chaotic and destroys cooperation and teamwork. We all want to achieve the best combination of freedom and responsibility.* — *Bill Gore, Co-Founder W. L. Gore*

The goal may seem overly ambitious and perhaps even too idealistic and romantic. However, all that can be done in complex situations is to look at the evolutionary potential in the present and try to create initiatives that pull in the desired direction and away from the undesirable state. Small steps will have to be taken, with frequent feedback, nobody knows what exactly will happen.

> *The only way to know how a complex system will behave – after you modify it – is to modify it and see how it behaves.* — *George E. P. Box*

This will bring us into the territory of what ought to be, not just what is; this is the territory of ethics. Some may be uncomfortable with that, but it is my take that we need to agree on a certain common value system that allows us to evaluate initiatives and practices; do they help us go in the right direction or not? This question cannot be dodged.

When dealing with complex challenges, we must replace the concept of big up-front plans and power-based hierarchy, or forever be stuck with substandard solutions and slow reaction times because of our low levels of engagement and resilience.

This book just had to be written. The challenges of complexity and rapid change are growing daily. Freedom is under attack both from elites and counter-elites. There is not much prospect of smooth sailing and calm waters in front of us, instead, there is an abundance of whitewater to be seen. It is too early to panic, but it would be overly naive not to sound the bell and wake up the citizens.

> *Well, there's some things a man just can't run away from.*
>
> *— John Wayne in Stagecoach*