



Guidelines for Flat Organizations

Overview

Transitioning into a flat organizational structure requires careful attention to accountability, coaching and culture. We have outlined key steps to take in two main areas of implementing a new management system: setting up the structure and maintaining it. We have pulled from a variety of industries to gather tools, resources, principles, and ideas that can be shaped for American Shakespeare Center.

Questions To Consider

- How do we establish accountability for outcomes?
 - How to handle interpersonal conflict?
 - How to manage development, provide and receive feedback?
 - How to distribute responsibility and have clarity for who owns what? How to decide who needs to be involved?
 - How do we kick off our new structure so we work together?
 - How to recognize talent and have different reward structures in a flat organization?
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Setting Up A Flat Team Management System

Acknowledge & Reset the Past

Identifying points of improvement: Patrick Lencioni identifies ways a team can experience lack of cohesion in his [Five Dysfunctions of a Team](#). Take an opportunity as a group to reflect on times when these following issues may have been present in your team, and how to improve in these areas. The questions below can be a starting point to fruitful conversation:

1. Absence of Trust: Do team members openly and readily disclose their opinions?
2. Fear of Conflict: Are team meetings compelling and productive?
3. Lack of Commitment: Does the team come to decisions quickly and avoid getting bogged down by consensus?
4. Avoidance of Accountability: Do team members confront one another about their shortcomings?

5. Inattention to Results: Do team members sacrifice their own interests for the good of the team?

(Re)building trust and cohesion: even with a team that has worked together for some time, a period of transition is a good opportunity to work on ensuring that there is a strong foundation of trust within the group. Teams can create a strong base of mutual trust and comfort through honest conversations about their past and present challenges, as well as more concrete trust and team-building exercises.

You can find examples of team exercises for building trust under [Tools & Resources](#).

Getting comfortable with conflict: when restructuring the way a team works together, there will likely be some disagreement. Establishing conflict norms early on can help team members work through these (necessary) debates in a productive manner. Rick Packer at Table Group, a consultancy for organizational health, [outlines](#) several potential conflict norms:

- Silence Equals Agreement: if a team member disagrees with something said at a meeting, the expectation should be that they speak up and voice their opinion.
- “Do You Support?”: asking this simple question at the end of a decision-making process (and requiring each person to answer) allows all opinions to be heard.
- Debate Trumps Agenda: discussing a disagreement should be prioritized over making sure the agenda for a meeting is completed.
- Offline Alert: difficult conversations around a disagreement should still take place in the group setting to make sure everyone understands the resolution.

Set New Norms & Governance Mechanisms

Establishing a social contract: social contracts are documents that outline the norms of operating as a team. These include logistics, positive behaviors to reinforce, and negative behaviors to actively avoid. A social contract can [instill a sense of responsibility, accountability, and trust among team members](#) – key to resolving the dysfunctions of a team outlined in the previous section. Starting here will provide an interpersonal foundation for moving ahead to the operational decisions your team will have to make.

You can find resources for developing a strong social contract under [Tools & Resources](#).

Structuring work: the Agile methodology is a great place to look for ways that a flat team can structure responsibilities in an effective way that maintains accountability and progress while allowing for adaptability. McKinsey provides a [helpful outline](#) of the main areas of operations where Agile work can help balance the “tension between stability and flexibility.”

1. **Structure:** in the Agile structure, employees are part of a semi-permanent 'function' (e.g, marketing, development) and several temporary cross-functional teams (e.g., a production, a campaign). Here is how key managerial support is divided between those:
 - a. Primary Department/Function: coaching, training, job infrastructure
 - i. Note: in a lean/flat team structure, coaching and training will be more peer-based. It is important to build a culture where asking for feedback and opportunities to learn from team mates is encouraged – rather than waiting to receive coaching.
 - b. Individual Project Teams: day-to-day work, performance measurement, determination of rewards
 2. **Governance:** decision-making is also segmented in Agile, which allows for higher speed and clear accountability when making strategic choices. By having a clear code for decisions, you can make sure the correct team members can move forward with the bottleneck of too many sign-offs. McKinsey outlines three types of decisions:
 - a. Type I: big decisions where the stakes are high
 - b. Type II: frequent decisions that require cross-unit dialogue and collaboration
 - c. Type III: decisions that should be parsed into smaller ones and delegated as far down as possible, often to people with clear accountability
 3. **Process:** this is where a common language (also incorporated into the social contract) can make a huge difference – ensuring that all teams and team members involved in a project are operating with a clear, codified set of operational norms and success metrics (regardless of their primary department).
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Maintaining A Flat Team Management System

Operate With Incredible Transparency

Setting shared goals: when operating in a flat, Agile setting, it is important to have full team alignment (and understanding) of goals – both for a project and for the organization as a whole. One effective method of shared goal-setting is the Objectives & Key Results (OKR) structure. OKRs help teams to define high-level strategy for moving their organization forward in important areas, which leads to much more effective and specific individual goals. [Reflektive](#) outlines several important questions to ask when writing an objective:

- Is the objective broad in outlook?
- Does the objective align with organizational goals?
- Is the objective challenging and inspiring?
- Is the objective timeboxed?
- Is the objective vital to organizational success?

Once an objective is determined, it is time to outline the Key Results. In their post, the Reflektive team writes: “key results describe outcomes and results, not activities, and are measurable indicators of success.” An effective KR will adhere to the five SMART goal qualities:

1. Specific
2. Measurable
3. Actionable
4. Relevant
5. Timebound

Note: OKRs are not only bound to organization-wide goals. It is a great structure to use for setting personal goals. They can be helpful when recognizing staff growth for reward opportunities (bonuses, salary, assignment to projects, etc.), as they can be concretely identified as being met or missed.

You can find resources for developing OKRs under [Tools & Resources](#).

Creating a culture of feedback: in a flat organization, it is crucial that all team members feel empowered to give and receive constructive feedback. While giving staff the tools with which to share feedback is important, a necessary first step is to develop a team culture where feedback is a deeply ingrained part of everyday life. Harvard Business Review outlines four elements that make for a [“feedback rich culture”](#):

1. **Safety & Trust:** as mentioned earlier, it is important to take time to get to know each other as teammates to build a sense of trust. This will better allow colleagues to feel that feedback is coming from a place of support – and to be honest if now is not the best moment for them to receive feedback.
2. **Balance:** positive feedback should not be limited to times when it is needed to “cushion” constructive criticism. It is important to strike a balance between consistent positive and negative feedback, as well as feedback for both larger and smaller issues.
3. **Normalcy:** rather than saving feedback for dedicated performance conversations, work it into the everyday life of your team – including in moments when groups are together. Having frequent, open constructive critiques will normalize giving & receiving feedback.
4. **Transparency:** the full team must understand that feedback as a daily norm and expectation is the goal. All team members should feel comfortable not only receiving feedback, but asking for it as well.

As outlined previously, any structure of feedback considered best for the team as a whole should be clearly codified and communicated so that all team members understand the expectations around giving and receiving feedback.

You can find resources for structuring feedback under [Tools & Resources](#).

Hold Frequent Team Check-Ins to Align & Reset Goals

Adapting the Scrum process: while Scrum is typically associated with the technology sector, it is actually a framework that can apply across all types of teams. At its core, the methodology creates a system of frequent check-ins and transparent assignment of responsibilities that can help a flat team keep moving forward on important projects. There are three [key elements](#) of Scrum that translate well into the non-technical world:

1. [Daily Standups](#): having meetings at the start and end of each day keeps the full team updated on progress and simplifies communication across the organization. They also are great opportunities to ask for help. These can take place live or even over messages during a dedicated time.
2. [Retrospectives](#): taking time at the end of each week to conduct a mini post-mortem of the week's activities allows for frequent opportunities for feedback and acknowledgment of the accomplishments the team has achieved. Conducting these frequently is especially crucial during the initial time of transition into a new team structure, but the frequency can be adjusted as time goes on and workflows are established.
3. [Kanban Board](#): this is simply a place to keep track of what everyone has on their plate. It can be physical or digital, but should be visible to all team members. Key takeaway for arts organizations: make all team-member responsibilities clear and public.

You can find resources for each stage of the Scrum process under [Tools & Resources](#).

Tools & Resources

Trust Building Exercise Library

- [Personal Histories Exercise](#): providing an opportunity for low-stakes vulnerability.
- [Team Effectiveness Exercise](#): teammates can take an opportunity to provide structured feedback to each other.
- [Virtual Team-Building Exercises](#): while COVID still limits in-person gathering, these exercises can be conducted digitally.

Social Contract Library

- [Agile Ways of Working - Social Contracts](#): this article provides helpful tips for undertaking the process of building a social contract, and outlines its many benefits.

- [Social Contracts for Agile Teams](#): a step-by-step guide to creating a social contract, from setting up a contract development meeting to sample items for your document.
- [Sample social contract 1](#): this template is a great starting point for customizing a contract for your own organization.
- [Sample social contract 2](#): use this collection of social contract templates from various industries as inspiration for your own.

OKR Library

- [OKR Team Playbook](#): a guide for building organizational OKRs as a team, from meeting set-up to tools needed. Includes helpful examples from a variety of industries.
- [Guide: Set Team Goals with OKRs](#): this resource from Google (where the OKR structure was first developed) includes downloadable [templates](#) for scoring and tracking your goals.

Feedback Library

- [How Pixar Fosters Collective Creativity](#): Pixar’s practice of holding open discussion sessions on works in progress (“brain trusts”) and giving opportunities daily feedback is a strong model for peer-led collaboration in the creative field.
- [12 Tips for Giving Peer-to-Peer Feedback](#): in a flat structure, it is important to understand how best to share feedback with one another. This article outlines 12 things to keep in mind when sharing constructive criticism with teammates.
- [The 30/60/90 Framework for Feedback](#): this helpful structure allows for an iterative feedback process so you can avoid having to make major changes in later stages of an initiative.
- [Using Peer-to-Peer Feedback to Enhance Learning](#): while this guide was developed for teachers, it can be helpful to anyone working on building feedback into the core of a flat team structure.

Scrum Library

- [Practicing Agile with non-tech teams of a startup – is it worth it?](#): a helpful guide to each stage of the process, with examples of systems for organizing work across steps.
- [Retrospective Team Playbook](#): a step-by-step look at how to organize a retrospective meeting, including templates for both in-person and digital versions.
- [How To Run a Sprint Retrospective Meeting](#): Nuclino expands on the retrospective meeting, including some helpful norms to set around the process, options for more offline versions, and how to assign follow-up tasks.