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Open Leadership

How Social Technology Can Transform the Way You Lead

THE SUMMARY IN BRIEF

“Be open, be transparent, be authentic,” are the current leadership mantras — but companies often push back. Traditionally, business is premised on the concept of control and yet the new world order demands openness.

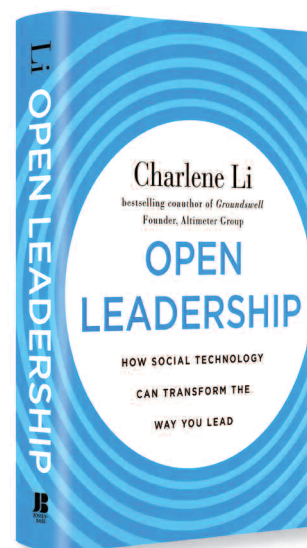
Open Leadership offers leaders a resource that shows how to tap into the power of the social technology revolution and use social media to be “open” while maintaining control. Social media expert Charlene Li (co-author of *Groundswell*) explains how Facebook, Twitter, YouTube, Yammer, Jive and other popular social media sites can improve efficiency, communication and decision making for leaders and their organizations.

Openness requires more — not less — rigor and effort than being in control. *Open Leadership* reveals step-by-step, with illustrative case studies and examples from a wide range of industries, how to bring the precision of this new openness both inside and outside the organization. It also includes suggestions that will help an organization determine an open strategy, weigh the benefits against the risk and have a clear understanding of the implications of being open.

By embracing social media, leaders can transform their organizations to become more effective, decisive and ultimately more profitable in this new era of openness in the marketplace.

IN THIS SUMMARY, YOU WILL LEARN:

- How to create guidelines, policies and procedures to thrive in the new culture of openness.
- How many successful companies have managed openness.
- What you need to include in your new openness strategy.
- How to deal with the tensions between openness and order.



by Charlene Li

CONTENTS

The Upside of Giving Up Control

Page 2

The 10 Elements of Openness

Page 3

Crafting Your Open Strategy

Page 4

Structuring Openness with Sandbox Covenants

Page 5

Open Leadership Redefining Relationships

Page 6

The Failure Imperative

Page 7

Starting the Transformation

Page 8

THE COMPLETE SUMMARY: OPEN LEADERSHIP

by Charlene Li

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INTRODUCTION

As your customers and employees become more adept at using social and other emerging technologies, they will push you to be more open, urging you to let go in ways in which you may not be comfortable. Your natural inclination may be to fight this trend, to see it as a fad that you hope will fade and simply go away. It won't. Not only is this trend inevitable, but it also is going to force you and your organization to be more open than you are today.

In the past, organizational leaders had the luxury of remaining ensconced in their executive suites, opening up only when they felt the need to. Today there is information leakage everywhere, with company miscues and missteps spreading all over the Internet in seconds. And all involved — from employees and customers to business partners — feel entitled to give their opinions and get upset when their ideas are not implemented. The fundamental rules that have governed how *relationships* work are being rewritten, because of easy, no-cost information sharing.

The challenge, therefore, is to redefine how those relationships will operate. Organizations and their leaders need to lay out the commitments they expect from these new relationships.

It is critical that your organization not enter into these new open relationships without guidelines. Simply opening up and devolving into chaos, or worse, “letting this take its natural course” are recipes for disaster. Being open requires more — not less — rigor and effort than being in control.

The struggle in balancing openness and control is a universal, human problem. Just as children grow and

develop their own voices that need to be heard, our customers, employees and partners want to be brought into the inner sanctum of the organization as well.

PART I: THE UPSIDE OF GIVING UP CONTROL

One March day not long ago, Dave Carroll was a United Airlines passenger waiting for takeoff. He looked out of the airplane window and couldn't believe what he was seeing. Out on the tarmac of Chicago's O'Hare airport, he saw baggage handlers tossing suitcases, sometimes dropping them on the ground. Among the items were guitar cases — and the alarmed Carroll, an independent Canadian musician and songwriter, realized that these were *his* guitars being thrown back and forth.

Sure enough, when Carroll landed in Omaha, his final destination, he opened his guitar case and found his beloved Taylor guitar badly damaged. Carroll was in a hurry to get to his gig, and he was booked with back-to-back shows, so it wasn't until three days later that he contacted United to report the damage.

But United refused to compensate Carroll for the \$1,200 repair — the company had a standing policy to not accept claims more than 24 hours after a flight, because as time passes it becomes increasingly difficult to pinpoint responsibility for the damage. Because Carroll submitted his claim more than three days after the damage occurred, United said that it would not pay for damages that could have been caused elsewhere.

Carroll pressed his case for months but made no progress, so he made a music video called “United Breaks Guitars” and posted it on YouTube. He felt better, and he really didn't think more than a dozen people or so would see it. That was on July 7, 2009. Within



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three days, the video had more than 1 million views, and Carroll's anthem became a viral sensation. By the end of 2009, there had been more than 7 million views and hundreds of news stories about Carroll's experience.

Understandably, United was aghast. The company immediately reached out to Carroll, who explained that his biggest desire was to have United's baggage damage policy changed.

Tony Cervone, United's SVP of corporate communications said, "We engaged directly with Dave as soon as this came out, and said, 'What happened and let us understand this better.' We listened, and then we changed a couple of the policies immediately."

Carroll posted a heartfelt video statement that explained the incident, applauded United Airlines for its efforts in reaching out to remedy the situation and even praised the professionalism of United's employees.

The New Rules of Open Leadership

What's changed today is that new technologies allow us to let go of control and still be in command, because better, cheaper communication tools give us the ability to be intimately familiar with what is happening with both customers and employees. Open leadership can be defined as: *Having the confidence and humility to give up the need to be in control while inspiring commitment from people to accomplish goals.* Open leadership fosters new relationships. To understand and govern how these new relationships work, we need new rules like the following:

- **Respect that your customers and employees have power.** If you ever need a reminder of what customer and employee power look like, just go read a social media monitoring report on your company from a vendor like Radian6, BuzzMetrics or Cymfony.
- **Share constantly to build trust.** At the core of any successful relationship is trust.
- **Nurture curiosity and humility.** The natural outgrowth of curiosity is humility, which gives you the intellectual integrity to acknowledge that you still have a lot to learn and also to admit when you are wrong.
- **Hold openness accountable.** In relationships, accountability is a two-way street — it makes clear the expectations in the relationship, as well as the consequences if they are not met.
- **Forgive failure.** Things go wrong all the time in relationships, and the healthiest ones move on from them, leaving behind grudges and blame. This is not to say that failure is accepted; rather, that it is acknowledged and understood. ●

Customer Support at iRobot

iRobot, the \$300-million manufacturer and marketer of the Roomba vacuum, integrates its discussion forums and community (hosted by Lithium Technologies) into its customer support system. When an unanswered question is elevated from the community forum to the iRobot support center, the service representative can see information about the customer's participation in the Lithium online community, such as which questions were submitted and which ones were answered.

The 10 Elements of Openness

The 10 elements of being open fall into two broad categories: six information sharing elements and four decision making elements.

Open Information Sharing

The six elements of information sharing can be defined primarily by the goal and the nature of the sharing:

1. **Explaining.** The purpose of this type of information sharing is to inform people about a decision, direction or strategy with the goal of getting recipients — employees, associates, distributors and others — to buy into the idea, so that everyone is working toward the same goal.
2. **Updating.** New publishing tools, like blogs, collaboration platforms and even Twitter, provide updates that are easily available whenever someone needs them. These updates capture the knowledge, expertise and actions that happen in the ordinary course of business.
3. **Conversing.** Today, anyone with a computer can provide feedback to the organization — comments on blogs, discussion forums, review sites — and, even better, the company can talk back. By conversing openly, an organization engages in these conversations with the intent of improving operations and efficiency.
4. **Open Mic.** Micah Laaker, a director at Yahoo!, has adopted the phrase "open mic" because it so aptly captures the essence of this type of shared information, where anyone and everyone is welcome to come forward and participate with no preconditions.
5. **Crowdsourcing.** The goal of crowdsourcing is to grow the sources of new ideas and gather fresh thinking to create or improve a new product or service. This was always possible (think of the

Summary: OPEN LEADERSHIP

Pillsbury Bake-Off, in which customers compete for prizes with new recipes they create). But the difference now is that this is happening on an unprecedented scale and is directed at encouraging a coherent contribution from an individual toward a specific goal.

- 6. Platforms.** EBay is a great example of an open platform — by standardizing how items are listed and how transactions are handled, the company has enabled millions of individual sellers to trade online. The goal behind open platforms is to create standards, protocols and rules that govern how organizations and people can interact.

Open Decision Making

There are four major types of decision making in organizations today:

- 1. Centralized.** A small number of people — typically the CEO and perhaps a small team around that person — have the knowledge and judgment to make centralized decisions.
- 2. Democratic.** In democratic decision making, a limited set of choices is put forward to a group and voting is used to make the decision.
- 3. Self-Managing.** In the consensus decision making model, every person involved and affected has to agree about whatever is being decided, resulting in tremendous buy-in. This type of decision making is often used in hiring.
- 4. Distributed.** This model of decision making is a hybrid of all of the preceding ones, in that it pushes decisions away from the center to where the information and knowledge to make decisions actually reside, typically closer to the customer. ●

PART II: CRAFTING YOUR OPEN STRATEGY

What is often missing when leaders try to decide how open to be is a coherent open strategy and “open-driven objectives.” With an open strategy, decision shifts from *whether* you should be open, to how open you *need to be* to accomplish your overall strategic goals.

There are four underlying objectives integrated into almost every successful strategic plan. The objectives apply to both internal and external situations, to an audience primarily of employees as well as to one of customers and partners. These objectives are to:

- **Learn.** First and foremost, organizations know that they must learn from employees, customers and partners before they can do anything else. Organizations and their leaders must be constantly open to learning. And

you must do this first before pursuing any other goal — otherwise, you risk operating in a vacuum.

- **Dialog.** Communication — both internal and external — transforms a relationship from that of shouting out one-way messages to a dialog between equals. And along the way, people in the conversation become more and more engaged, to the point where they have a dialog without you having to be present. At the core, marketing and communications is about building relationships, but the key is knowing how to do it in a way that feels relevant and “authentic” to someone.

- **Support.** People both inside and outside the organization need help at different times — ranging from pre-sale to post-sale.

- **Innovate.** Creativity needs to be fostered, both inside and outside the organization. Organizations are starting to turn to their customers for ideas, leveraging crowdsourcing markets, like crowdSPRING, uTest and InnoCentive, for design, testing and ideation, respectively. Customers and employees are also clamoring to have a say in what is created. ●

Understanding and Measuring the Benefits of Being Open

It’s hard to quantify the value of a relationship, because we can tap into that value in so many different ways.

The difficulty with today’s social technologies, like Facebook, blogs, discussion forums and Twitter, is that they appear to lack clear, direct benefits compared to more established relationship channels. In actuality, the activities taking place on those sites are inherently measurable, but we have not yet established a body of accepted knowledge and experience about the value of these activities versus the costs and risks of achieving those benefits.

Research shows that the open-driven objectives all create some common benefits, in that they:

- **Remove friction.** By removing barriers and access to information and people, the cost of information sharing and decision making is lowered. It is also simply easier to do.

- **Scale efforts.** The culture of sharing means things spread faster and wider, with less direct investment.

- **Enable fast response.** The real-time nature of social technologies means that you can respond quickly. In fact, if you are not there to head off the growing wave, you risk being overrun.

- *Gain commitment.* This is probably the hardest to quantify but the most important as you win the hearts and minds of your employees and customers.

The Ultimate Metric

Many companies have adopted the Net Promoter Score (NPS) as a key metric of customer loyalty and satisfaction in their organizations. The NPS asks just one question to gauge customer satisfaction: “How likely are you to recommend [company] to a friend or colleague?” on a 0 to 10 point scale. People who respond “9” or “10” are considered Promoters, those who respond “7” or “8” are Passives and those who respond “0” to “6” are Detractors. To calculate your company’s NPS, take the percentage of your customers who are Promoters and subtract the Detractors. Satmetrix, which deploys and manages NPS loyalty programs, benchmarked the NPS scores of several industries, with companies like Vonage (45 percent), Charles Schwab (36 percent), Apple (77 percent) and Google (71 percent) leading in their respective categories.

NPS is especially interesting in that this single metric is strongly correlated with repeat customer purchase. Moreover, the NPS explains differences in relative revenue growth rates. To increase your NPS score requires that you increase the number of Promoters and decrease the number of Detractors. Greater openness can directly improve NPS in these two areas — consider how updating more frequently can convert Passives to Promoters, or how conversing in a more open manner can meet the needs of Detractors.

The beauty of NPS is that it is immediately and easily measurable. Having a common metric across the company provides not only a unified view, but also a way to make consistent trade-offs. ●

Structuring Openness With Sandbox Covenants

Open leadership requires that you create structure, process and discipline around openness when there is none, so that people know what to expect and how to behave in a new open environment. Make the rules, involving your employees and customers along the way. Think of it as one of your first openness initiatives — writing what could be called the “sandbox covenant” that will govern *how* you will enter into these new relationships.

One way to think about openness is to use a playground sandbox metaphor. On the one hand, there are clearly defined boundaries to the sandbox, and within

those boundaries, it’s a safe place to play. On the other hand, the sandbox still has rules: No throwing sand, no taking someone’s truck unless you have permission.

Using Covenants to Build Trust

Covenants are promises that people make with each other, which differ from traditional corporate policies and procedures that *dictate* how things will operate within organizations. The philosophy behind covenants is more suited to openness strategies because the promises, bargains and contracts reflect a real trade-off and transfer of power and responsibility. When leaders open up and give up control, they trust that employees will do what they promise and that customers will respond and engage in a civil manner. A key part of a covenant is accountability — spelling out what happens if either party doesn’t keep their side of the bargain.

A recent survey by Deloitte found that only 22 percent of companies have any type of social media guideline or policy in place. Without any sort of guidelines, employees and their managers will be at a loss as to what is allowed and what isn’t. When situations come up, managers should all be able to recognize them as a problem (or not) and turn to the guidelines for advice on potential next steps. The following elements are essential components of a company’s social media guidelines:

- **Introduction: Setting the Stage.** It’s important to start off with the right tone — which is why your guidelines should start with a statement of encouragement and support.

- **Guidelines.** Explain when and for whom the policy applies. Explain why the organization needs social media guidelines and in particular when it applies to a person’s *personal* use of social media. Address identity transparency, responsibility, confidentiality, common sense and judgment.

- **Best Practices for Social Media Practitioners.** Have a personality. Develop a voice. Address spelling and grammar. Respond to people.

- **Oversight and Consequences.** Describe the process for managers to follow.

- **Additional Resources.** Include HR, press and legal contacts for managers and employees, and training.

The sandbox covenant that you put in place has to be consistent and congruent with the kind of relationship you have with your employees and your audience. If *they* are not ready for openness, if *you* are not ready for openness, then you will have to make your sandbox covenants tighter and more closely defined to have a good working relationship. ●

Orchestrating Your Open Strategy

Openness, by definition, means that there will be bridges built between traditionally isolated departments and silos — and some people may not be all that happy about this. People are comfortable in their well-defined positions; then, suddenly, openness changes the rules and requires that they work together in concert toward a common goal.

This change doesn't happen overnight, nor will it happen on its own. You will need an overall action plan that lays out the details for the open strategy and goals that you developed — essentially, the score that you will use to conduct and lead your organization. Your detailed plan should include the following five elements:

- **Create robust socialgraphic profiles of your customers and employees.** There are three elements of socialgraphics: social audit, engagement audit and influence audit. By mapping the basic socialgraphics of your audience, you'll have a fundamental baseline of where your customers and employees are today.
- **Identify points where workflow and stakeholders are affected.** One of the first actions you need to take is mapping out the workflows, processes and stakeholders that will be affected by your open strategy goal. You need to anticipate how requests need to be handled and to clearly communicate that to the people who will have to take action. Here are three types of workflows: triage of real-time requests, crisis management and internal communications.
- **Determine the best organizational structure.** The Altimeter Group has found that successful organizations adopt one of three models: organic, centralized or coordinated. The *organic* model is very natural and allows openness to develop where it is most likely to grow and thrive. In a *centralized* model, one person or group leads the efforts and sets the pace. In a *coordinated* model, one group provides best practices, with execution at the edge. The right model for you depends heavily on the level of openness in your organization, your goals and how you are currently structured.
- **Assign roles and responsibilities.** In most situations, there are three major responsibilities: laying out the strategy, building and maintaining the tools, and engaging with the community. The strategist is the person who sets the direction of the open initiative and makes sure that a strategic plan is in place, corralling executives behind it and securing resources as needed. The builder or program manager decides on the technology, details the business model and workflow, and manages ongoing maintenance. The community manager

facilitates and responds to the community, be that communicating with an external community or fostering internal employee collaboration.

- **Design appropriate training and incentive plans.** Some companies, like Humana, have social media training modules uploaded on their intranets, with titles like “Understanding LinkedIn in 15 Minutes” and “Understanding Twitter in 15 Minutes.” Other organizations organize mentorships, whereby younger, more socially savvy employees buddy up with a senior executive for weekly online training sessions. But a more important education and training initiative to consider is one for changing mind-sets and behaviors. It comes down to the incentives the organization puts in place. When someone sees a benefit in being more open and sees a reward for doing so, behavior tends to change. ●

PART III: OPEN LEADERSHIP REDEFINING RELATIONSHIPS

There are two mindsets that define and determine how open you are as a leader. The first is your view of people — in general, are you optimistic or pessimistic about people's intentions? No one is completely optimistic nor completely pessimistic — and, like an open strategy, this often depends on the situation at hand. But in general, open leaders believe in “win-win” situations, in which when people act in their self-interest it also turns out to be in the best interest of the organization.

Optimism allows open leaders to be more open with information, both in sharing it with a greater audience and in gathering it from different sources. If a key component of your open strategy involves more open information sharing, then you will need to have leaders who are more optimistic than pessimistic in their mindsets.

The second mindset is your view of your successes: as either coming primarily from your efforts as an individual or stemming from the efforts of a team. A good leader always has elements of both views, but in tough times, where do you draw your strength from as a leader — yourself or the people around you? Open leaders recognize their limitations and are quick to collaborate with others, whereas individualistic leaders turn inward and rely first on their own strength and ability to prevail.

If your open strategy requires more distributed decision making, then having leaders who are comfortable with collaboration will be crucial.

The Importance of Curiosity and Humility

Open leaders are inherently curious about the world and have an insatiable need to constantly seek out

Summary: OPEN LEADERSHIP

opportunities to improve themselves and the world around them. They are curious about customers, about their employees, about suppliers, about industry trends and about the wider world. Most intelligent leaders are open to what they don't know, but open leaders are driven by a deeper quest to learn constantly. They look at social technologies as a unique way for them to extend that learning in a way that they never could before.

Being curious isn't enough to make people open leaders — you can be a constant learner but not necessarily want to change your view of the world. Humility is also needed, and as Jim Collins pointed out in his book *Good to Great*, it's a key characteristic of great leaders. But in the context of open leadership, humility plays a special role — it allows open leaders to accept that their views on something may need to shift because of what their curious explorations expose. In a sense, humility gives them the self-awareness and confidence to admit when they are wrong or need help. ●

Nurturing Open Leadership

To be a leader, you must first be a good person with intangibles like integrity, honesty, fairness, respect for people, a sense of humor, daring — in short, traits that, as described in Warren Bennis' classic *On Becoming a Leader*, get people to trust and follow you.

In addition to characteristics like integrity, open leadership requires one over all others — authenticity. “Managing Authenticity: The Paradox of Great Leadership,” an article that appeared in the *Harvard Business Review* in 2005, explains: “Authenticity is a quality that others must attribute to you. ... Authenticity is largely defined by what other people see in you and, as such, can to a great extent be controlled by you.”

Open leaders have the ability to pull the relevant parts of their authentic selves into the conversation, to innately know which parts of their identity and personalities to show to whom and when.

So, how do you get started being an “authentic” open leader? First, you must remain true to your values and focus on what you want to accomplish.

The second thing you can do to build your authenticity skills is to start small. By tapping into the core person that you are — and just as important, centering your efforts on the people and audiences you want to reach — you'll soon find and develop your voice.

Transparency Is Not Show-and-Tell All

The other key skill you will need to develop is transparency. Executives like Brian Moynihan, the new CEO

of Bank of America, understand the importance of transparency, saying, “We ... are changing the way we do business. We are committed to fairness and transparency.” Moynihan is acknowledging that after the transgressions of the past decade, organizations need to be more forthcoming about how they conduct business.

Like authenticity, transparency is defined not by you, the leader, but by the people you want to trust you and your organization. How much information do they need in order to follow you, to trust you with their money or business?

This skill can be described as making information “visible.” You make visible your goals, and also the challenges, threats and opportunities you face. Greater visibility can also come from *not* sharing, as long as it's accompanied by reasons why the leader cannot say more (for example, “We're in negotiations”).

Supporting Open Leadership with Technology

Some leaders have learned that they are capable of using social technologies to extend and support their leadership. Open leaders will need to be very comfortable with using social technologies to implement an open strategy. This has to start at a personal level — how comfortable are *you* with these technologies yourself? To develop new open relationships, you'll have to *scale* your authenticity and transparency. ●

The Failure Imperative

A key part of being an open leader is the ability to effectively deal with failure, because even with the best structures and planning in place, things go wrong. By mastering failure, you create an environment in which risk taking is encouraged and recovery from failure becomes a skill that everyone in the organization possesses. Essentially, this is about your ability to create a culture in which people have such trust in each other that they know they can safely take risks.

How you, as an open leader, deal with failure is just as important as how well you deal with success. If you feel you cannot be open to mistakes and failures, think of the consequences of this closed mindset. Your colleagues will be afraid to step out or to speak up, and that goes against the very core of being open.

John Chambers, the CEO of Cisco, often asks prospective employees about results. “I never get hard work confused with success. So I walk you through your successes, and what you did right. I also ask you to tell me about your failures. And that's when people make a tremendous mistake. All of us have had mistakes

Summary: OPEN LEADERSHIP

and failures, yet it's surprising how many people say, 'Well, I can't think of one.' That person immediately loses credibility with me. It's an important ability to be very candid on what mistakes they've made, and then the question is, what would you do differently this time?"

Structure Your Risk-Taking and Failure Systems

There are four processes and skills that you can build into your organization to create the structure and discipline that will give you and your organization the resilience you need to deal with failure:

- **Conducting post-mortems.** Companies need to listen to what is being said about their brands and businesses online. And if your organization encounters rough waters, consider how you will recover.
- **Preparing with worst-case scenarios.** Worst-case scenario planning involves brainstorming all of the things that could possibly go wrong, getting them out on the table, and putting in place mitigation and contingency plans to reduce risk and anxiety.
- **Building in responsiveness.** Best Buy has a little monitoring program called Spy that allows it to monitor social media mentions about the company. CMO Barry Judge views social media as a constant opportunity to engage. He wants "to make it as easy as possible for people to complain." Rather than see this as a negative, he views each complaint as an opportunity to hear about all the daily mistakes and failures at Best Buy, in an effort not only to resolve those problems, but also to make Best Buy better in the long run.
- **Preparing yourself for the personal cost of failure.** Personal failure has never been so exposed as it is with social media. We must, therefore, have a whole different attitude about failing — about trying something that doesn't work, but, just as important, how to address your failure. ●

Starting the Transformation

Here are some recommendations on how to get started with a transformation:

Create a sense of urgency with information sharing. The opportunity with today's open technologies is that you can share the data and information needed to make your case not only vivid, but also personal. Rather than hearing the need for urgency from the top, you can also hear your colleagues and peers join in on the discussion. So when you start making your case for transformation, be

Four Behaviors of Open Leaders

1. Hiring, training and promoting the right people.
2. Creating a culture that supports being open.
3. Removing barriers to being open.
4. Encouraging risk-taking and speedy recovery from failure.

sure to bolster the impact of your message with the voices of others in the organization.

Identify the values that will carry you through the transformation. Every organization has a set of core values, even if they are not expressly laid out, that you as a leader will be able to tap. Decide which ones will form the basis for the new culture and, using social technologies, demonstrate your commitment and connection to those core values in authentic ways. And, by all means, ask that people join you in spreading those core values to others.

Lead by example. To have credibility in the new culture, the leaders have to demonstrate the attitudes and behaviors that will be positively received and rewarded.

Start small to win big. Building up confidence in the transformation and the new culture with little steps will actually speed up the transition, not slow it down.

Institutionalize systems and structures. Processes, procedures and guidelines all help institutionalize the change so that it becomes not only easier, but routine.

Be patient. Although you need to create urgency to spur action, you need patience to guide the change through its sometimes aching slow first stages.

The advantage of pursuing an open strategy is that you will do it in the company of people who wish you the best, who will be there to support you and will count themselves among the many who will benefit from your success. ●

RECOMMENDED READING LIST

If you liked *Open Leadership*, you'll also like:

1. ***Trust Agents* by Chris Brogan and Julien Smith.** Need to learn more about increasing trust with your audience via social media? Let two preeminent experts guide you to greater transparency.
2. ***Getting Naked* by Patrick Lencioni.** In his latest engaging business fable, Lencioni tells the story of a consultant's eye-opening experience and the lessons it provides about the positive impact of transparency.
3. ***Leadershift* by Emmanuel Gobillot.** The age of mass collaboration is challenging the very nature of leadership. Gobillot provides key advice to navigate the new frontier.