

# include

Inclusive Leadership  
in the Digital Age

A hand is shown reaching out from the left side, with fingers slightly curled as if about to touch the surface of water. The water is a light blue-grey color with some ripples. Overlaid on the right side of the image are several large, colorful geometric shapes: a yellow circle, a blue circle, a purple circle, and a light blue circle, all partially overlapping each other and the background. The background is a soft, out-of-focus sky and water scene.

# Foundations for Leaders and Everyone who Wants to Become One



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Inclusive Leadership in the Digital Age

# Foundations for Leaders and Everyone who Wants to Become One

You can't solve problems by using the  
same kind of thinking you used  
when you created them.

Albert Einstein



## Authors

The 'INCLUDE – Inclusive Leadership in the Digital Age. Foundations for Leaders and Everyone who Wants to Become One' was created by emcra - Co-shaping Europe, Berlin (Michael Kraack, Heike Kraack-Tichy), the EU-Fundraising Association and Adam-Mickiewicz University, Poznań (Zofia Jakubczyńska), together with all the INCLUDE project partners. It is a partial outcome of the INCLUDE project that was financed with the support of the European Commission.

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# The EU project INCLUDE and the project partners



Keywords such as self-organisation, autonomy, flat hierarchies and shared responsibility are becoming more and more common in our new working world. Our project INCLUDE supports people and teams in implementing a new, practical, and innovative leadership approach in the digital age that will help them successfully shape the future of their organisations together. To this end, INCLUDE offers a step-by-step guide with interactive learning and teaching materials.

Berlin-based emcra - Co-shaping Europe is a leading training and consulting company in the areas of management and organisational development as well as national and European funding and fundraising. emcra accompanies foundations, associations and (social) enterprises through the challenges of change management. The focus is on financing/funding, digital transformation, new inclusive leadership approaches, project management and risk management, and the implementation of international standards.

CCI Vratsa is a non-governmental organisation that serves SMEs in Northwest Bulgaria. Since our establishment in 1991, we have been working towards the achievement of the most favourable economic environment for the Bulgarian business and facilitation of its activity. We work in close cooperation with local authorities, other NGOs, and business support structures from abroad. CCI Vratsa is a host structure of Europe Direct Center and we have three regional offices in Northwestern Bulgaria. The structure of CCI Vratsa comprises more than 1.000 companies – both private and state owned.

The IBWF e.V. (Institute for business consulting, business development and research e.V.) is the network for medium-sized business consultants. As the only network, it unites with its members all advisory disciplines. The own certification of its members underlines the high quality standards in solution-oriented advice. Participation in forward-looking EU projects for user-friendly solutions, paired with a cooperative understanding of advice from its members creates practical, user-friendly solutions for SMEs.



lvh is an active interest group of craft-people in South Tyrol. The main activity of lvh is the representation of the interests of crafts towards local and regional institutions, other associations, and the society. In addition, the lvh offers a wide range of services to its members, such as accounting, personnel accounting, tax computation, consulting on the fields of innovation, legal advice and different training courses, mandatory courses but also non-mandatory courses. We have approx. 140 employees and approx. 8.000 members.

The Cyprus Project Management Society (CPMS) was established in February of 2008 by a group of professionals equipped with the passion, knowledge, and competences to promote the Society's vision. The Society is a non-profit professional association, which draws strength and competences from the voluntary participation and contribution of its members. It promotes the benefits of utilising project and other management methodologies and standards to companies, professionals, and the society.

The EU-Fundraising Association e. V. (EUFA) is a non-profit organisation active throughout Europe, with its headquarters in Berlin. EUFA was founded in 2010 by a network of professional EU fundraisers. One of the main concerns of the EUFA is European integration and the support of European citizenship. Through its work, the EUFA aims to encourage individuals and organisations to think and work in a European context. As a professional organisation, the EUFA aims to establish quality standards for EU fundraisers, grant managers, and project managers from the profit and non-profit sectors.

Adam Mickiewicz University, Poznań, is the major academic institution in Poznań and one of the top Polish universities. Its 100-year old reputation is founded on a long tradition of higher education in the City of Poznań and the outstanding current achievements of its staff, students, and graduates. AMU as a research university employs 4,000 academics and has more than 35,000 students who can choose from among 366 fields of study offered by 21 faculties.

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## Executive Summary

The theoretical and methodological foundations for inclusive leaders and everyone who wants to become one in the digital age are laid in this survey. A new or expanded leadership approach is necessary because the environment for effective leadership in the digital age is radically changing.

Every organisation should be open to the concept of self-organisation, amongst other reasons so that they can distribute decision-making responsibility across many shoulders. A holistic approach that understands inclusive leadership as both the development of people and organisations is important for this. Leaders can become more effective again if they focus on decentralisation, shared responsibility, and collaborative decision-making. Leadership today is always inclusive.

Inclusive leadership in the digital age involves two aspects: working with and on people, and working with and on organisations. If they are to act successfully in this complex field of work, inclusive leaders need a systematic approach and the right tools for the job. The INCLUDE approach provides a process model that makes it possible for leaders and their organisations to apply the INCLUDE approach on the job and to implement it together with their team. 27 practically relevant tools bring INCLUDE to life. They can be allocated to the following five areas of development: 'leader', 'people', 'structure', 'process', and 'technology'.

The advantages of the INCLUDE approach at a glance.

- INCLUDE makes leaders effective (again).
- INCLUDE fosters a high level of commitment from all those involved.
- INCLUDE fosters the self-organisation, decentralisation of decision-making, and autonomy of all those involved.
- INCLUDE is complex and, at the same time, easily applicable.
- INCLUDE reduces dependence on external advisors.
- INCLUDE leads to all those involved doing what needs to be done.

With the INCLUDE approach, the complex challenges of the digital age can be mastered.

# 01

## Introduction





## Introduction

The theoretical and methodological foundations for inclusive leaders and everyone who wants to become one in the digital age are laid in this survey. The INCLUDE project consortium began work in autumn 2019. The project was continued from 2020 onwards during the particular conditions of the coronavirus pandemic and was completed in 2022. The importance of digital achievements in recent years, in particular the constantly improving tools for collaborative work online, was powerfully illustrated once again by the successful collaboration of the seven INCLUDE partner organisations from five European countries.

The following question, which preoccupies many leaders in organisations and enterprises, was posed at the outset of INCLUDE: how can I lead my organisation when I am not even at all sure myself where the digital journey is heading? INCLUDE wants to provide an answer to this. In doing so, it builds on the findings of various transnational European projects, in particular the project 'Inclusive Leadership' (2016-2018) and the project 'Digitalisation' (2017-2019). Numerous INCLUDE experts were involved in both projects, and they were able to further strengthen and deepen their collaborative work throughout this project.

The INCLUDE foundational analysis is built up as follows:

The question is dealt with in chapter 2 of why the digital age requires a new leadership approach. A definition is provided for the distinction between leadership and management and for how these two terms are used in the context of INCLUDE. In addition, it is shown what is changing for organisations and enterprises in the digital age, and how leaders can deal with these new parameters with a changed frame of mind.

Chapter 3 briefly outlines which target groups can particularly benefit from the INCLUDE approach. These are small and medium-sized enterprises (SME), small and medium-sized organisations (SMO), start-ups, and training providers. In addition, there is a discussion of what these INCLUDE target groups' prerequisites are for the application of a new leadership approach.

Chapter 4 is dedicated to the specific challenges for leaders in the digital age. Numerous challenges facing both leaders and their organisations are clustered into eleven thematic areas. A detailed diagram depicts which of the 27 INCLUDE tools that are described in more detail in chapter 5 can be deployed to solve individual challenges.

In the comprehensive theory and method sections of chapter 5, the theoretical foundations of INCLUDE are connected directly to the

27 INCLUDE tools for practical implementation. Five INCLUDE areas of development are derived from the preliminary theoretical considerations that have been made until that point. Inclusive leaders in the digital age should grow in each of these areas of development: 'leader', 'people', 'structure', 'process', and 'technology'. The INCLUDE foundational analysis flows into an easily understandable process model in chapter 6 that enables leaders and their organisations to apply the INCLUDE approach on the job and to implement it together as a team. This process model consists in two phases: a leader phase and an organisational phase. In the leader phase, leaders focus primarily on their own self-perception and on laying the necessary foundations for the subsequent

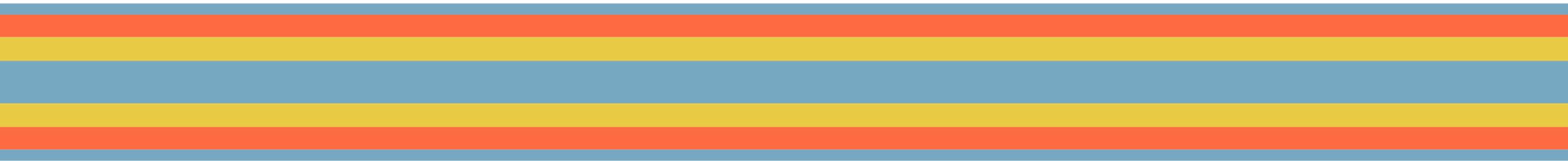
INCLUDE process of organisational development. In the following organisational phase, as many people from the organisation as possible (and perhaps even those outside it in its external environment) work together to collaboratively develop and implement a specific new organisational model, one step at a time.

This theoretically grounded survey is supplemented by three further INCLUDE products that are each available online free of charge under the terms of the Creative Commons License CC-BY-SA 4.0. These three products provide practical support to future INCLUDE leaders for the implementation of this approach.

1. The INCLUDE email course offers a step-by-step, low threshold introduction to the topic of inclusive leadership in the digital age. The course can be signed up for here free of charge in six languages (Bulgarian, English, German, Greek, Italian, and Polish): [http://link.emcra.eu/INCLUDE\\_EmailCourse](http://link.emcra.eu/INCLUDE_EmailCourse).
2. The most important practical support that INCLUDE offers is the publication 'INCLUDE – Inclusive Leadership in the Digital Age. Handbook for Leaders and Everyone who Wants to Become One.' The handbook is available here in six languages (Bulgarian, English, German, Greek, Italian, and Polish): [http://link.emcra.eu/INCLUDE\\_Manuals](http://link.emcra.eu/INCLUDE_Manuals).
3. An INCLUDE curriculum was developed specially for training providers and trainers who would like to use the INCLUDE approach for their courses. This curriculum builds on the foundations of the EQF (European Qualifications Framework). This document, entitled 'INCLUDE – Inclusive Leadership in the Digital Age. Content for Training Courses and Workshops', is also available for download in six languages (Bulgarian, English, German, Greek, Italian, and Polish) here: [http://link.emcra.eu/INCLUDE\\_Curriculum](http://link.emcra.eu/INCLUDE_Curriculum).

# 02

## Why Do We Need a New Leadership Approach?





Management vs. Leadership – What is the difference? // Management and Leadership @INCLUDE // Inclusive Leadership – What is it and why is it important? // The digital age - A new game with new rules // A new mindset for a new time: Why do we need inclusive Leadership in the digital age?

Most of those with responsibility in organisations and companies are under an illusion. They think that they understand our reality and are able to perceive the world as it really is, but many leaders have simply not been able to do this anymore for a long time. And yet they continue to lead or manage their company as if nothing had changed. They play the 'leadership game' as if the rules of this game had not undergone a drastic change. Every morning they go to work and behave as if they know and are able to decide (almost) everything. This is what they expect of themselves. And those working for them also keep on playing their old role: they expect that their superiors will always make the right decision and safely guide them, like a captain guiding his ship. This means that they never need to accept responsibility and, if anything goes wrong, they can always point the finger at their 'incompetent' superiors. But this isn't how the game works anymore. Most of those in responsibility feel this every day - but they are unable or unwilling to openly show their insecurity on the outside because this goes against the expectations that they and others have about themselves. This is why it is no surprise that leaders feel overwhelmed,

regardless of whether they are responsible for a worldwide company or a small team of co-workers in an organisation that has successfully found its target group over the years in the local area.

**The current illusion of control amongst leaders must first be recognised by them and then transformed**

Constant excessive demand leads to negative stress and illness. It has become so common for the overwhelmed leaders of our day to find fault with themselves, rather than recognising that the underlying conditions have drastically changed for everyone in a position of responsibility. The current illusion of control amongst leaders must first be recognised by them and then transformed. This is all about recognising a new reality. When this occurs, it becomes possible for leaders to once again do justice

to their leadership role, and the organisations that they are responsible for will have good a chance of also being successful in the future.

**Why are the right decisions often not being made today?**

The dilemma can be seen in a decision-making situation in a medium-sized company in the production industry (cf. Sassenrath 2017: 60f.). There is a choice between:

- 1. Replacing an obsolete production plant with a modern plant that is up-to-date with the latest technology.
- 2. Reorganising and optimising the entire supply chain by integrating all suppliers in a joint cloud application.

Option 1 will definitely lead to an increase in productivity. This is easy to calculate. In itself, this is not a bad investment. However, the opportunities afforded by option 2 are significantly higher. A better and more transparent stream of information makes it possible for all of those involved to, for example, intelligently connect the separate steps in the supply chain with each other. With all likelihood, this will lead to a greater increase in productivity than an investment in option 1.

**When making decisions, many leaders choose the safer option in order to avoid taking any uncalculated risks**

Despite this, however, the overwhelming majority of companies choose option 1, primarily because this investment is easier to calculate and so can be more easily justified within the company. Option 2, by contrast, carries a greater risk of leading to problems and conflicts, since reorganising the supply chain requires a different way of working and communicating for the potential success

to materialise. Option 1 revolves 'simply' around technical feasibility and the reliability of production plants. These are the age-old challenges of the industrial age and controllers are able to handle these. In option 2, on the other hand, it is the challenges of the information age that take centre stage: it relies on the smoothest possible cooperation between all those involved, both inside the company and outside with the partners of the supply chain. Instead of machines, people are at the centre, even though the improved collaboration relies on a digital cloud application. Instead of the question: which machine should we purchase, it is necessary amongst other things to answer the following questions: are the right people available to us in the organisation? And if so, are these people exchanging their knowledge across the divisions of their departments, for example?

Many organisations and companies lack important organisational foundations for option 2. There is also a lack of leaders to rise to these challenges. This is why those in responsibility who currently feel overwhelmed will prefer the safer option 1. This makes sense from the perspective of many appointed leaders. They don't have to take any uncalculated (career) risks that could threaten them if the implementation of option 2 were to fail (cf. Taleb 2018; Gigerenzer 2020). And yet this choice means that their companies or organisations will continually lose their competitive edge because of this kind of approach, compared to those who have already recognised how the underlying conditions of the digital age have drastically changed. At the same time, they are able as leaders to continue to maintain the illusion to themselves and their staff that they have 'everything under control': the newest machinery has been bought. What can be bad about that? We have always done things this way.

**Before digital transformation comes mental transformation**

The future cannot be shaped with the approaches of the past. This is why: 'before digital

transformation comes mental transformation' (Sassenrath 2017: 33). The leader who understands this and embarks on this journey has made the first step towards securing the future of their organisation and, at the same time, has the opportunity to lead a more relaxed life in the future.

This is not an easy path, but there is no alternative. At the very start it is important to analyse what should no longer be left unquestioned on this path. For example, many international standards or even curricula in our universities are based on the implicit assumption that our complex systems can, in principle, continue to be hierarchically controlled from the top down. Millions are being earned with these practical methods and educational courses. The most highly recognised university lecturers and consultants market these concepts. Learners or customers of consultants are confident of future success with this knowledge. It is at this point that, at the very least, doubts should be expressed.

**It is impossible to shape the future with a defensive mindset**

It is important to examine exactly which elements of knowledge really do (still) help in our changed and complex environment to master a decision-making situation like the situation in the example above. Being prepared to critically scrutinise one's own knowledge and all previous experiences is the first step in the right direction. Beyond this, it is vital to analyse what the further education landscape is currently offering in terms of relevant courses. Two examples for clarification: classic project management methods such as PRINCE2 are still appropriate for many projects. PRINCE2 is not suitable, however, if someone would like to change the leadership culture in their organisation. This will not work without agile concepts that are more open to different results. The same applies to modern GRC approaches.

GRC stands for governance, risk management and compliance. These are important building blocks in management today, but all common GRC approaches are anchored in traditional top-down decision-making structures. In addition to this, they focus primarily on the avoidance of dangers. But with a defensive mindset alone it is not possible to shape the future. Without consciously taking the risk in investment option 2 in our example, the opportunities arising out of the situation will not be used.

## 2.1 Management vs. leadership – What is the difference?

Classifying and differentiating between the terms leadership and management will help us to better understand what constitutes inclusive leadership in the digital age.

First the term management. A central feature of management is generating order and consistency in an organisation, for example checking results with the help of controlling or solving tangible challenges in daily business (Kotter 1990: 4ff.).

Management can be defined as follows: 'the ability to lead a group of people with the help of values and principles, to control the processes involved and to implement the necessary resources in order to reach a previously defined goal' (Staudt 2017).

**The excessive demand that our leaders face in the digital age has a lot to do with the fact that they think of themselves more as managers than as leaders**

What then is leadership? Leadership generates change and movement in an organisation. It revolves around specifying a new direction, for

example, or having an inspiring effect on one's own environment (Kotter 1990: 4ff.).

Leadership can be defined as: 'the ability to use visions to give people a new perspective and purpose so that they identify themselves with the goals and values' (Staudt 2017).

It is not helpful to create a sharp distinction between the terms. This is precisely why the INCLUDE approach has a fluid attitude to the barrier between management and leadership. Neither is possible without the other. Even management tasks require, for example, the ability to lead teams. It is also important not to act as if leaders do all the important tasks and managers 'just' focus on mundane day-to-day business. In the relevant literature it is common for the term 'leadership' to be used too positively, meaning that 'management' is often downplayed wherever a distinction is made. This has little to do with the reality (Malik 2005: 25).

'Managers do things right, leaders do the right things' (cf. Groth). Even though this sentence leans towards the portrayal of leadership in a more positive light, it is still correct. It shows especially clearly that both management and leadership are of existential significance for the success of companies and organisations. Leadership is not better or worse than management, it simply has a different focus. Both good leaders and good managers are desperately needed. It is important that those in leadership are aware of both roles and are able to fill them as the need arises.

In reality this is rarely the case. There are very few in leadership who are able to master both roles equally well. The excessive demand that our leaders face in the digital age has a lot to do with the fact that they think of themselves more as managers than as leaders. They have learned management at their business schools or universities and in their daily work in their organisations. Most of those in leadership have been and are being trained as managers (cf. Groth). There is nothing wrong with it, but as a leadership skill it is not sufficient for the digital age.

## 2.2 Management and leadership @INCLUDE

The INCLUDE approach is targeted on the one hand at improving management. Tools and methods are being made available to help those in leadership do things the right way (even) better. Beyond this, it is also about doing the right things to be successful in the future. Leadership in the INCLUDE sense focusses on wanting and enabling what is new and enabling it together with the team, stakeholders, etc. This does not refer to the standard daily life of a company. This is because digital transformation is not just like any other change. It is a revolution comparable to the industrial revolution that started in the second half of the 18th century (cf. Brynjolfsson/McAfee 2014; Schwab 2019).

**Our companies and organisations must open up to the idea of 'self-organisation'**

Revolutions drastically change economic and societal conditions. The INCLUDE leadership approach is a set of instructions for real life so that what is new can be shaped differently and better than before. This approach takes into account the revolutionary changes of the digital age, where those working on their own are almost always overwhelmed when they have to make decisions about the future.

Leadership (and management) should therefore be shared between as many people as possible. For this reason, it is necessary that our organisations and companies open up to the idea of 'self-organisation'. Leadership and management can become the task of as many different agents as possible within an organisation. External control and the classic top-down hierarchies no longer work in a digital and highly connected world. The reality of complex markets and societies is completely different

today than it was in the 20th century and can be best mastered when responsibility is shared and thereby corporately accepted. Leadership must become inclusive.

‘Self-organisation’ does not, however, mean in any way that concepts such as power or influence disappear from an organisation. The classic hierarchical ladder, in which members of an organisation are both subject to a leader and in charge of other employees is ideally expanded or even replaced by several natural hierarchies that are formed as the need arises (cf. Laloux 2016: 78f.). ‘Power’ is then relocated to the teams or individuals who have the greatest possible expertise to make the right decisions. When these ‘experienced players’ are allowed to take over, the entire working and decision-making process is sped up. This can, for example, lead to engineers answering questions from the factory workers directly when they need their opinion and also the other way around, when factory workers who know their machines inside out are able to give the engineers feedback without being prompted, for example in the case of improvements. Who needs departmental leaders to give both groups permission to talk? Or who needs departmental leaders that organise the work in such a way that the workers and engineers never cross paths? Nobody! A leader that has made the decision to follow the path of ‘self-organisation’ can become effective again. The paradox is: the leader must first forego their traditional power if they are actually to become ‘more powerful’ and exert real influence.

### 2.3 Inclusive leadership – What is it and why is it important?

The ‘inclusive leadership’ concept introduced in this section is based on the results of an EU project with the same name (School for Leaders Foundation/Alp/EU-Fundraising Association 2018). The starting point and foundation of this concept was the simple

question: can everyone in our organisation be a leader? The answer is a resounding yes. ‘Inclusive leadership’ expands the concept of leadership and supports or even demands the contribution of everyone in an organisation. Leadership in the sense of ‘Inclusive Leadership’ means: ‘doing things with people rather than to people’ (Hollander 2012: 9). In this way, the rigid demarcation between the roles of leaders and followers is broken down. A change in roles is both possible and helpful. The ‘inclusive leadership’ concept has the aim of establishing this approach in the mindset of all those involved.

**Leadership in the sense of ‘Inclusive Leadership’ means: ‘doing things with people rather than to people’**

The definition of ‘inclusive leadership’ is as follows: ‘Inclusive leaders embody a leadership approach that appreciates diversity, invites and welcomes everyone’s individual contribution, and encourages full engagement with the processes of decision-making and shaping reality. The aim of inclusive leadership is to create, change and innovate whilst balancing everybody’s needs’ (School for Leaders Foundation/Alp/EU-Fundraising Association 2018: 5).

#### Four areas of development in the ‘inclusive leadership’ approach

Establishing internal collaboration within an organisation on the basis of ‘inclusive leadership’ requires work and commitment from all those involved. The ‘inclusive leadership’ approach distinguishes between four areas of development, with which ‘inclusive leadership’ can be learned or continually improved

(School for Leaders Foundation/Alp/EU-Fundraising Association 2018: 25ff.). In their daily routine, inclusive leaders occupy themselves with:

1. Practicing self-awareness,
2. Living a shared vision,
3. Building relationships and
4. Creating change.

The four areas of development enable an ongoing process, in which inclusive leaders can continue to develop themselves, one step at a time. The four fields of learning and development are connected to each other and exert mutual influence on each other.

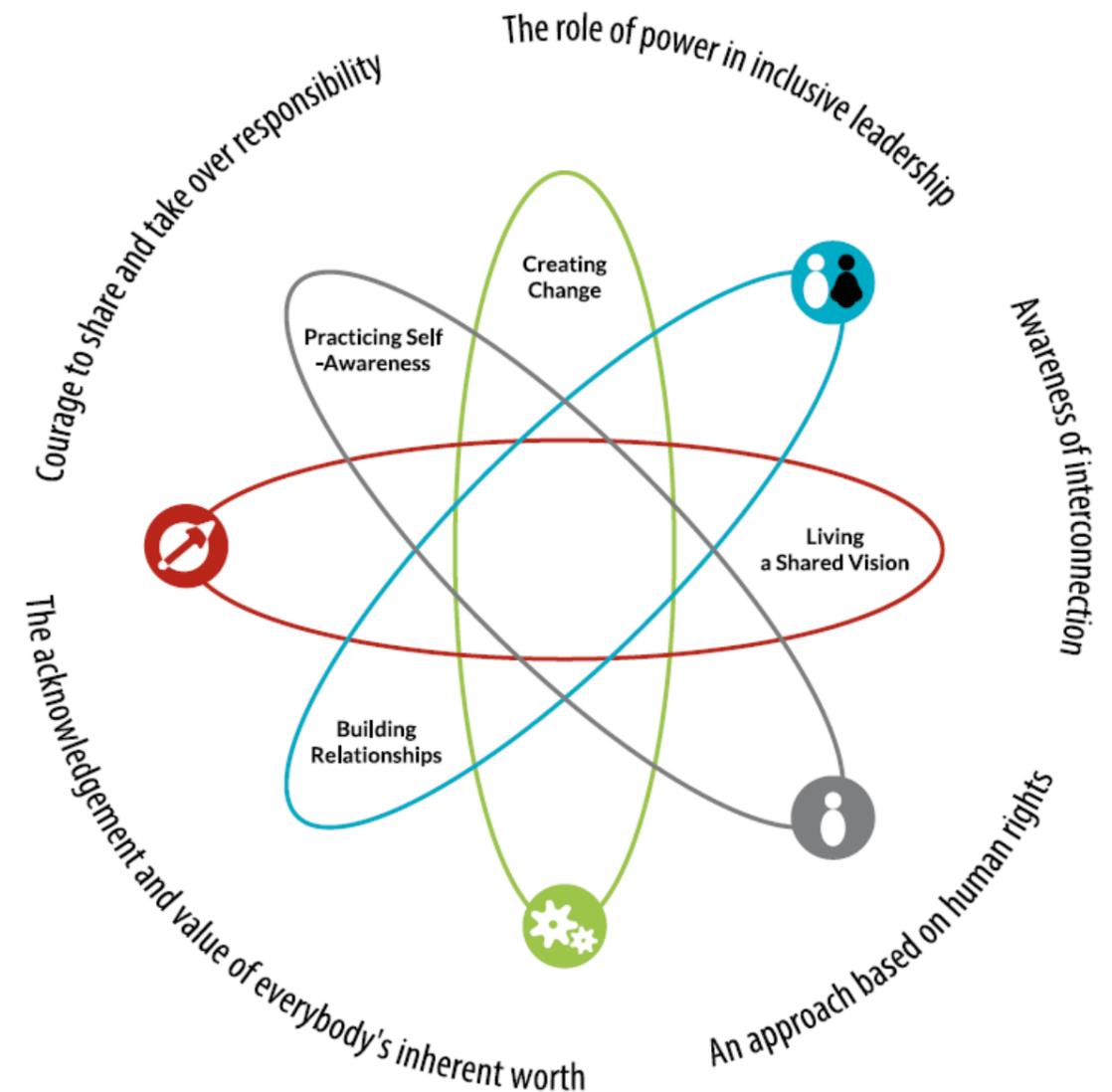


Figure 1: The Inclusive Leadership Approach (School for Leaders Foundation/Alp/EU-Fundraising Association 2018: 24).

In all four areas, members of an organisation can and should continue to develop themselves. The areas are characterised by the following distinctives (cf. more detail about this School for Leaders Foundation/Alp/EU-Fundraising Association 2018: 26ff.):

## 1. Practicing self-awareness

The first area of development is about mustering the courage to explore oneself and examine one's own patterns of thinking and behaviour. It is imperative for individuals to know themselves better if they want to continue to develop as leaders. It is particularly encouraged that leaders act authentically as people. This leads to a reduction in the stress that arises when people often feel forced in their professional positions to play a specific part. When someone makes a conscious decision that their character is more important than their appearance, they will find that their own work becomes a lot easier. In addition to this, it can have a positive impact on their work with their colleagues.

**The four fields of learning and development are connected to each other and exert mutual influence on each other**

## 2. Living a shared vision

Living a shared vision means being open and inviting others to genuine participation, for example in a process of change. That means emphasising the involvement of everyone and motivating everyone to make an individual contribution, right from the development of a shared vision for the future of an organisation through to the implementation of this vision. 'Fellow visionaries' can be inspired across all hierarchical levels and be turned into active fellow players.

## 3. Building relationships

Relationships need to be built and maintained. Inclusive leaders accept this challenge and are fully aware that they will need to spend a considerable part of their working time communica-

ting with individuals or in teams. The foundation of this relational work is the willingness to value the contribution of every single person. It is all about supporting the diversity in an organisation as much as possible and recognising differences as potentials for innovation, for example different personalities, backgrounds, or experiences. Inclusive leaders work with a mindset that accepts different approaches and consciously delegate responsibility.

## 4. Creating change

Creating change and daring to innovate are central components of leadership. These processes of change become inclusive when as many agents as possible are involved both inside and outside the organisation, so for example even being prepared to consciously go beyond the borders of an organisation. Creating shared changes supports the feeling that all those involved have of belonging to the group. Alongside this, inclusive leaders will always focus on the strengths of their teams or of the individual when faced with a challenge, rather than trying to minimise their weaknesses.

### How 'inclusive leadership' contributes to dealing with challenges in the digital age

There are various reasons why an inclusive leadership approach can make an important contribution towards making the right choices and setting an important course for a successful future in the digital age. 'Inclusive leadership' starts with the basic assumption that everyone can and should accept (leadership) responsibility. The 'inclusive leadership' approach is therefore both about the development of staff and the development of the organisation. At the same time, it always balances the personal development of all those involved in an organisation, in other words not just the support of designated leaders in a rigid hierarchy, and the organisational development of the entire unit. This holistic approach is well suited to meeting the complexity of the chal-

lenges in the digital age.

Many leaders are asking themselves at the moment: how can I lead my organisation when I am not sure myself where the (digital) journey will take me? A single leader in the traditional

**'Inclusive leadership', with its holistic approach, develops both staff and the wider organisation**

sense is overwhelmed when it comes to understanding or even shaping our modern and complex world.

'Inclusive leadership' brings relief to those in leadership positions, because decision-making and responsibility is deliberately shared. Inclusive leaders need to involve themselves less in their role as leaders and are less stretched than their colleagues in traditional hierarchical organisations. The deciding factor lies in allowing the powers of self-organisation to bloom (cf. Hermann/Pfläging 2020: 66ff.). Leaders that allow self-organisation and thereby consciously give up their own power will gain, amongst other things, the time they need to address the important questions about the future of their organisation (cf. Wiens/Klein 2017: 30).

'Inclusive leadership' also has advantages from the perspective of the employees. Committed and interested employees who don't view their work as a necessary evil that has to be done between 9 and 5 will welcome flatter hierarchies, greater involvement and flexibility that allows them, for example, to better combine their different spheres of life and roles such as employee, father/mother, volunteer, carer etc. Their ideas, wishes, and experiences should be listened to and valued in the interest of the organisation.

If this is accompanied by a clean out of the 'gun cabinet' in an organisation – replacing 'blood, sweat and tears' speeches or threats with 'sense, customer contact, appreciation, autonomy, openness, trust' (Sassenrath 2017: 67) – it

can lead to a new quality of collaboration. This new quality of collaboration and a further quality of a cooperative style of providing services and sharing responsibility is also necessary if one is to be successful in the ever-changing parameters of the digital age. Inclusive leadership is better suited to this than a system with traditional decision-making processes from the top down.

## 2.4 The digital age - A new game with new rules

The rules of the game have drastically changed for all organisations in the digital age. This can be understood in terms of five important categories (cf. Rogers 2016: S.7):

### Category 1: Customers and target groups

People used to try and persuade customers or target groups to buy their products by using adverts. Today, communication with target groups is all about achieving attachment to a brand and generating recommendations. This is only possible if customers actually find a product to be useful after they have chosen to purchase it. The transparency in the internet has meant, amongst other things, that products and services can be more easily compared. Customers today have better grounds for making decision and actively share their experiences with others. Customers determine which brands make it big.

**When shifting from the analogue to the digital age, drastic changes in key strategic areas force leaders to change their thinking**

## Category 2: Competition

Competitors used to steer well clear of each other. Competition was a zero-sum game: one man's win was simply another man's loss. In the digital economy, however, there is an increasing tendency towards cooperation. Competitors cooperate in key areas, for example when the most significant sector leaders cross boundaries to work together on a research project on foundational technological developments relevant to their sector. Anyone who takes a look at the consortiums that have been funded by the EU's Horizon Europe funding programme will be able to understand this development well. Even just 30 years ago it was still the case that the most important assets were clearly the property of a company. The platform economy of the new century has changed that from the ground up, however. Airbnb has become an important competitor in the area of tourism without owning a single holiday home itself.

## Category 3: Data

Data is now the most important immaterial asset of an organisation. Data makes it possible to construct new business models that would not have even existed 10 years ago, for example. In the second half of the 20th century data was primarily used to optimise processes within an organisation. There were often challenges involved in this since – at least in the larger organisations – the most important data was saved under the jurisdiction of the separate departmental leaders and therefore out of the reach of all other departments. Anyone who wants to survive economically must break through this segregated way of thinking and ensure that data can be used across different departments.

## Category 4: Innovation

Many traditionally led organisations do not have a culture of mistakes or the insight that mistakes can make an important contribution to processes of innovation. And yet mistakes

are the quickest and most cost-effective method for testing new things and learning from them. This requires agile processes that are open to different results. Innovation used to be driven by the idea of finding the correct and best solution for a product, but today organisations start by searching for their target groups' most significant problem. The challenge today is: which problem do we need to solve if we are to be successful in the future? The intuition and practical experience of old-school authoritative leaders is almost never of help here.

## Category 5: Value

In the world where users can change their service provider with the click of a mouse, organisations will only survive if they are constantly searching for new possibilities to improve the customer value of their products or services. This turns business models into dynamic systems that need to be constantly re-examined in light of their potential value for the relevant target groups if they are to survive in the long term. Any owner of a small company who is not asking what business opportunities present themselves for the company from new digital technologies will probably not have a future. It makes sense to involve as many people as possible in order to identify these new opportunities. Those employees who are in contact with customers everyday usually know exactly what these customers need. It simply makes sense to ask them and listen carefully to what they say.

The table below shows an overview of the dynamic of change in each of the five central categories:

	FROM...	TO....
CUSTOMERS	<ul style="list-style-type: none"> <li>• Customers as mass market</li> <li>• Communications are broadcast to customers</li> <li>• Firm is the key influencer</li> <li>• Marketing to persuade purchase</li> <li>• One-way value flows</li> <li>• Economies of (firm) scale</li> </ul>	<ul style="list-style-type: none"> <li>• Customers as dynamic networks</li> <li>• Two-ways communications</li> <li>• Customers are the key influencer</li> <li>• Marketing to inspire purchase, loyalty, advocacy</li> <li>• Reciprocal value flows</li> <li>• Economies of (customer) value</li> </ul>
COMPETITION	<ul style="list-style-type: none"> <li>• Competition within defined industries</li> <li>• Clear distinctions between partners and rivals</li> <li>• Competition is a zero-sum game</li> <li>• Key assets are held inside the firm</li> <li>• Products with unique features and benefits</li> <li>• A few dominant competitors per category</li> </ul>	<ul style="list-style-type: none"> <li>• Competition across fluid industries</li> <li>• Blurred distinctions between partners and rivals</li> <li>• Competitors cooperate in key areas</li> <li>• Key assets reside in outside networks</li> <li>• Platforms with partners who exchange value</li> <li>• Winner-takes-all due to network effects</li> </ul>
DATA	<ul style="list-style-type: none"> <li>• Data is expensive to generate in firm</li> <li>• Challenge of data is storing and managing it</li> <li>• Firms make use only of structured data</li> <li>• Data is managed in operational silos</li> <li>• Data is a tool for optimising process</li> </ul>	<ul style="list-style-type: none"> <li>• Data is continuously generated everywhere</li> <li>• Challenge of data is turning it into valuable info</li> <li>• Unstructured data is usable and valuable</li> <li>• Value of data is in connecting it across silos</li> <li>• Data is key intangible asset for value creation</li> </ul>
INNOVATION	<ul style="list-style-type: none"> <li>• Decisions made based on intuition and seniority</li> <li>• Testing ideas is expensive, slow and difficult</li> <li>• Experiments conducted infrequently by experts</li> <li>• Challenge of innovation is to find the right solution</li> <li>• Failure is avoided at all cost</li> <li>• Focus on finished product</li> </ul>	<ul style="list-style-type: none"> <li>• Decisions made based on testing and validating</li> <li>• Testing ideas is cheap, fast, easy</li> <li>• Experiments conducted constantly by everyone</li> <li>• Challenge of innovation is to solve the right problem</li> <li>• Failures are learned from, early and cheaply</li> <li>• Focus is on minimum viable prototypes and iteration after lunch</li> </ul>
VALUE	<ul style="list-style-type: none"> <li>• Value proposition defined by industry</li> <li>• Execute the current value proposition</li> <li>• Optimise the business model as long as possible</li> <li>• Judge change by how it impacts the current business</li> <li>• Market success allows for complacency</li> </ul>	<ul style="list-style-type: none"> <li>• Value proposition defined by changing customer needs</li> <li>• Uncover next opportunity for customer value</li> <li>• Evolve before it is necessary, to stay ahead of the curve</li> <li>• Judge change by how it could create the next business</li> <li>• "Only the paranoid survive"</li> </ul>

Figure 2: Changes in key strategic domains while shifting from the analogue to the digital age (Rogers 2016: 7).



## Digital Transformation – The future is now

The digital age is shaped by the fact that technological innovations are being developed at the same time in multiple areas. When these innovations also begin to cross fertilise, the result is the emergence of often revolutionary new applications or products, for example when artificial intelligence, quick data transfer and electrical mobility etc. all come together in the field of autonomous driving.

**Not only are the decisions that need to be made increasing in number and complexity, but the assumptions underlying these decisions are changing more quickly than ever**

It is therefore true that technical developments drive our digital age forwards. But the question remains: are technical developments also the greatest challenge in the digital age? Is this the reason that so many of those with respon-

sibility in our large and small organisations are permanently overstretched? An example of this: the WEpod, a small driverless bus, has been operating a 7 km regular service in the Dutch town of Wageningen since 2017. This is not the future but our present. The WEpod is not an Apple product that we didn't spot until now. It was developed by a few students for 3 million Euros. If a small start-up has managed to bring an autonomous prototype of a small bus that is suitable for daily use to the streets, then technology can hardly be the greatest challenge of the digital age. With 3 million Euros, VW didn't even manage to reach the preliminary stage for the updated design of an ashtray (cf. Sassenrath 2017: 7ff.). 'Technology may be [...] the driving force of digital transformation, but it is not its challenge. The challenge is the enormous increase in the rate at which the parameters relevant to decision-making are changing' (cf. Sassenrath 2017: 9). To put it more simply: Not only are the decisions that need to be made increasing in number and complexity, but the assumptions underlying these decisions are changing more quickly than ever before. This is the central challenge for management and leadership in the digital age. To meet this challenge, those in leadership need a new mindset and a set of tools that goes far beyond those that most leaders have known or used up till now (Tetlock/ Gardner 2016; Taleb 2014).

## 2.5 A new mindset for a new time: Why do we need inclusive Leadership in the digital age?

If the economic and societal parameters are changing as much as they are at the moment, then it is high time for our assumptions about leadership and management to also be subject to review.

One example of the potential for disruption that reigns in our present makes clear that we are just standing at the start of the digital revolution and the pressure to change will most likely increase even more (cf. Sassenrath 2017: 8):

- A taxi journey in Germany for one kilometre currently costs about €1.50. For an autonomous taxi without a driver this cost would be reduced to €0.30. A mid-range car in Germany currently costs around €0.60 per kilometre.
- 95 percent of all passenger vehicles are standing still. Only 5 percent are typically in use on the roads in Germany at any given time.
- The iPhone has become more important for many young people today than having their own car or driving licence.

**We are just standing at the start of the digital revolution and the pressure to change will most likely increase even more**

No one would like to swap with the leaders of the automobile industry right now. But it is particularly suppliers, car dealerships and small car workshops that need to prepare themselves for a different future. The few factors above make clear how different the world will be in 25, 50 or 100 years from what we think is normal

today. What are the options for the streets in our cities when they are no longer being used as parking space for unused vehicles? Who is ready to imagine this future? Who could have imagined at the start of the 20th century how much the development of the car would change our inner cities and infrastructure?

## Ahead is the place where no one knows their way around

'Ahead is the place where no one knows their way around. [...] Management 1.0 won't work with industry 4.0' (Sassenrath 2017: 15). When there are no patented recipes for success, the leaders of today need to feel their way forward one step at a time, taking risks and unbuckling the safety belt. No one can plan something new; it can only be discovered. Persistent trial and error offer good chances of achieving long-term success on the market. Using only cost planning, sales planning, innovation planning, staff planning, etc. will not lead to success.

**Trial and error and the courage to take risks – important leadership skills of the future**

The current mindset of our leaders is, however, still based on the assumption that hierarchical organisations and top-down planning will in principle continue to work well. The following is characteristic of that mindset (cf. Sassenrath 2017: 15):

- Decisions should be made by the leaders;
- There must be a system that guarantees the implementation of decisions through instruction and control;
- Planning and execution take place independently of each other;
- It is sensible in an organisation to group together similar tasks into departments;

- The planned economy does not work as an economic system. But: without annual plans and budgets an organisation or a company will not work.

At its core, this is the mentality that worked well during the age of industrialisation, when it was all about organising clearly defined tasks as efficiently as possible. Workers on a conveyor belt could be replaced, initially by other workers and then later by machines.

### Complex systems and simple control – it won't work

In the complex and dynamic digital world, the mindset described above is no longer up to date. This is true of large organisations and companies, but most small and medium-sized organisations and companies can also no longer be led by these comparatively simple means. At first glance it may seem to be easier for a small organisation to make the right decisions. But even lead car mechanics or leaders of children's nurseries are overwhelmed today when they have to decide from the top down how the GDPR (EU General Data Protection Regulation) should be implemented, how cyber dangers, for example through viruses, can be repelled, or how internal resistance to the introduction of a new software solution can be overcome. These are, by comparison, relatively easy decision-making situations. The future of the organisation is not at stake, it is not about new ideas or visions such as, for example, how a car workshop can respond to the scenario outlined above or what a children's nursery should offer parents and children in the digital age.

**The control of any system cannot be less complex than the system itself**

Most leaders are still trying to direct a system that is becoming ever more complex with a comparatively simple control system. This cannot work. System theory provides the

relevant explanation: the control of a system cannot be less complex than the system itself (cf. Sassenrath 2017: 16). Leadership in the digital age requires a mindset that perceives and reflects the complex reality.

Added to this is the fact that our everyday understanding convinces us that we can extrapolate from the way an individual behaves to the actions of a whole group. It is a particularly dangerous error to assume that the society in a country is simply the sum of the people living in it. This is just as false as assuming that a car is nothing more than a collection of different metals and plastics. A car works completely differently. Otherwise, we would see new cars standing around at scrap yards. What is true of large systems such as national economies is also true for many organisations and companies that function according to their own complex rules. Leaders have to know these rules if they want to be successful and effective in the future.

Communication is an important key for understanding and leading these complex systems. Enabling different and improved communication in teams and organisations means that leaders in the digital age are creating a platform for different and better products and services. A negative example is when supervisors make demands in the weekly meeting that have little to do with the daily challenges and employees are ultimately forced to find their own solutions to keep the business running from week to week. Peter Drucker hit the nail on the head a long time ago: '90 % of what we call management are actually practices that keep people back from doing their work' (The Betacodex Network).



### 12 principles of a new mindset for inclusive leadership in the digital age

What does the mindset look like that fits the reality of our organisations in the digital age? The following 12 principles offer today's overwhelmed leader an orientation point (cf. Hermann/Pfläging 2020: 111ff.; Sassenrath 2017: 39ff.).

#### 1. Allow more autonomy

When the autonomy of individuals and teams is increased, they will be able to react more independently and more adequately to impulses such as those of customers. By contrast, those who are focussed only on their careers will rely on the favour of superiors and will simply 'tell them what they want to hear' rather than developing innovative ideas oriented around the needs of customers or target groups.

#### 2. Support federalisation

When small, authorised, and cross-functional teams orient themselves around the needs of customers and target groups, departmental egos and rigid demarcations can be overcome. This can, for example, lead to important knowledge being better collated and used within the organisation.

#### 3. Make self-organisation possible

When one is willing to forego micromanagement and demands from the top down, individual employees and teams will assume greater responsibility. Decision-making processes will become more inclusive. There is a good chance that fewer wrong decisions will be made by overstretched leaders and the entire decision-making process will be accelerated. This will allow the organisation to react more quickly to the requirements of the market and to changing parameters.

#### 4. Establish alternative measurements of success

If one stops paying attention to growth, market power and maximising profit, and starts paying attention to what fits the internal culture of the organisation and to creating values that are important in terms of the target group, then one can expect success that goes beyond the one-dimensional performance figures. One positive side effect is that, alongside all this, the classic metrics mentioned above can also improve.

#### 5. Create transparency and share information

When all necessary information is available to people and teams that can make decisions de-centrally and autonomously, then more economically viable and intelligent decisions can be made. In the hierarchically led structures common until now, this means that leaders must be prepared to forego power. They will be rewarded, however, in that their own workloads will be reduced and they will no longer make poor decisions that have remained unquestioned for far too long in a hierarchical world. This is only possible because leadership is rarely given honest feedback in an organisation that is led from the top down.

#### 6. Find sensible long-term goals

Once one foregoes short-term targets and extensive measurements of goals or key performance indicators (KPI), then space will emerge to get up to speed with the demands of a living and complex environment that cannot easily be planned. Sensible and long-term goals enable flexible reactions and offer room to manoeuvre. Just like this: our products and services should be significantly better in five years than they are today, we want to use this to generate more income, so that our entire body of staff from cleaners to CEOs will earn a greater amount.

#### 7. Enable another participation in success

Once individual performance assessments or incentives such as bonus systems have been abolished, other models will take their place that allow all employees in an organisation to be genuinely involved in its success. Sufficient income is just one dimension of this participation. As well as this, incentive systems undermine, for example, the willingness to cooperate within an organisation and can lead to customers not being sold the right product.

**These 12 principles complement each other. They don't function as a menu for someone to simply choose the one that they like the most**

#### 8. Plan less in order to be more agile and faster

Once one stops constantly planning every little detail, one can use the time saved to be more alert and to react to the constantly changing environment. Agility, flexibility and speed are necessary if one is to react appropriately to quickly changing conditions. The worldwide corona pandemic has shown, for example, which organisations and companies were able to adapt to a new state of play within a short space of time. Some organisations were even strengthened by the corona shock. They have proven to be robust or even „antifragile“. This is the goal that inclusive leaders in the digital age should set themselves (cf. Taleb 2014).

#### 9. Orientation should not be around the fiscal year

Once decisions are uncoupled from the fiscal year or from quarterly goals, amongst other things it will mean: goodbye to December fever! Money will never again have to be thrown away at the end of the year. The pace of work in an organisation and the supply of necessary resources has little to do with which period our national financial management deems appropriate for determining our tax liability. Organisations work like interval training: several short sprints are interspersed with phases of analysis and assessment in order to make significant progress in a suitable timeframe. Self-organised teams should decide themselves how much time is required for this.

#### 10. Abolish bureaucracy and allow experts to do their work

Once as many rigid rules and reporting obligations as possible have been abolished, work will no longer be about constantly chasing the real demands of the market or the customers. The 'top' and 'bottom' of an organisation will disappear when decisions are consistently made in an unbureaucratic and decentralised way by individuals or teams who are best qualified on the basis of their expertise.

#### 11. Distribute resources differently

For decisions to become decentralised, decentralised units have to be equipped with the necessary resources. This is the only way for them to receive the autonomy that will enable them to act. There is no room in this system for those who love their own status. This is something that inclusive leaders will need to accept.

#### 12. Let reality play its part

Once the centralised and static distribution of resources and responsibility has been abandoned, the often rapidly changing environment will have the opportunity to exert more of an influence on internal decision-making. In the place of a central planned economy in an organisation, a flow will emerge that creates more value for target groups and generates more profit for the organisation.

With this mindset, inclusive leaders can act in keeping with the times. Having a clear and binding set of principles makes it possible for our organisations and companies to manoeuvre through digital change. It is important to understand that these 12 principles complement each other. They don't function as a menu for someone to simply choose the one that they like the most.

# 03

## Target Groups Characteristics and Needs





## Who has INCLUDE been developed for? // Particular features of small and medium-sized enterprises (SME), small and medium-sized organisations (SMO), start-ups and training providers // Prerequisites for INCLUDE

This handbook was written for everyone who carries leadership responsibility or who would like to take on more responsibility in the future. In the digital age, leadership is partially redefined and restructured. INCLUDE leaders must be prepared to proactively face up to their altered role. Anyone who is open to new theoretical approaches and practical methods will be able to benefit from INCLUDE.

The INCLUDE approach can also be profitably studied by leaders who are working in hierarchical top-down structures and who prefer this traditional type of organisation to stimulate new or further thinking. The approach has not, however, been developed to convince sceptics who believe in the supremacy of very hierarchical leadership concepts of another approach.

To clarify: considerable success has been achieved and good services have been provided to society even in traditional organi-

sations and enterprises led from the top down. This is not being denied. It could, however, be more efficient, more customer-oriented, more cost efficient etc. This really applies to every organisation, regardless of whether they are enterprises working in the market or as trusts, charities, or socio-economic organisations. INCLUDE is directed at those who are prepared to move ahead courageously with the help of this approach.

**INCLUDE is directed at those who are prepared to move ahead courageously**

In this handbook, the foundations are laid for leaders who want to change and develop themselves and their organisations to be able

to do this. INCLUDE has been designed for everyone who:

- would like to restructure an organisation from the ground up so that it is prepared for the challenges of today and tomorrow;
- would like to gradually restructure an organisation one step at a time, in other words to promote gradual changes using their internal resources;
- would like to carry out smaller changes in order, for example, to implement solutions that are tailored to their specific challenges as a leader;
- would like to introduce changes on an operational level by, for example, implementing pragmatic tools to solve daily challenges.

Four groups of people were in focus when the INCLUDE approach was being developed. These are current and potential leaders from small and medium-sized enterprises (SME), from small and medium-sized organisations (SMO), from start-ups, and from training providers in the vocational training sector.

The INCLUDE approach has been designed in a way that is particularly well suited to these four groups of people. This does not mean that it cannot be successfully implemented as a whole or in part by other interested parties, regardless of whether they come from small or larger structures.

### The four INCLUDE target groups

**Small and medium-sized enterprises (SME)** form the basis of the European Union's economy. 99.8% of all enterprises outside of the financial sector are SME, and they employ roughly 2/3 of all employees (European Commission 2018). The vast majority of consulting and training concepts have, however, been designed for large enterprises since these are the ones who have the budget to pay external consultants and trainers. For most SME and microenterprises, by contrast, their finances are usually tight and the pressing challenges of their day-to-day business occupies centre

stage. This has the result that in SME, even leaders work more 'in' the enterprise than 'on' the enterprise. In other words, they take too little time for the development of structures and processes, as well as for the comprehensive analysis of new and fundamental changes, such as digital transformation.

**Four target groups: SME, SMO, start-ups, and training providers**

**SMO** are **small and medium-sized organisations**, for example foundations, societies, associations, co-operative structures, or scientific institutions. These non-governmental organisations have in common that they are not (or at least not primarily) active on the market, in other words, making a profit is not the only or the primary focus of their work. Like SME, SMO are therefore often not able to buy external support at significant expense. They form, however, a large part of the so-called third sector, which employs roughly 28.3 million people across the EU (Third Sector Impact Project 2018). That is more employees than the construction sector, for example. Even more than many SME, SMO are affected by a lack of resources in terms of time and money for a substantial discussion of the necessary structural developmental measures. Alongside their focus on their daily work, they must apply for funding to finance their work. This is largely from state funding and / or resources from private sponsors. Fundraising and the development of funding projects are activities that tie up important resources. Without these activities, however, they cannot work successfully. In addition to this, leaders in many SMO face the challenge of having to integrate and lead unpaid volunteers alongside their full-time employed staff.

Young enterprises or organisations, meaning **start-ups** both in the economy and in the third sector, are very important in the digital age. They develop new products or services and are

creating a large part of tomorrow's employment. Start-up does not always mean start-up, however. There is an important group of new launches that are primarily financed by external capital, for example from venture capitalists. The focus of these new launches is often on quick growth in a one-dimensional way. It would be possible, however, to create better structural conditions from the start, even when it comes to management and leadership. This would lead to an even more successful net value added for these start-ups which, when successful, sometimes develop into significant national or international players. This would be possible by paying consistent attention to the INCLUDE ideas from the very start. By far the largest start-up group are enterprises and organisations that are built up by a founder or by a small founding team either without or with only very limited external resources. SME often take the plunge into economic independence with publicly subsidised credit for their founding. Non-profit organisations are commonly left out in the cold and must build the organisation one step at a time through unpaid personal contributions. A large part of the SME and SMO that go on to be successful began in this way. The third group, which are not really start-ups in the traditional use of the word, consists in enterprises and organisations that are due a generational change in the leadership. This could be, for example, where a skilled craftsman in a workshop hands over the leadership to a new owner due to his or her old age. In this situation there are numerous opportunities for the new people in charge to make use of the INCLUDE approach.

**Training providers** in the professional training sector are usually working as an SME in the vocational training and education sector. But there are also societies, associations, etc., i.e., SMO from the third sector, that are active in the educational sector. To this extent, the information already outlined above for SME and SMO also applies to these providers. Training providers can be important multipliers for the INCLUDE approach if they go along with the INCLUDE process for organisational development within their own company. They are even

more important as providers of INCLUDE training courses if they spread the content of INCLUDE by communicating it to their specific target groups.<sup>1</sup>

## Good prerequisites for INCLUDE

The organisations and enterprises that should primarily benefit from INCLUDE bring good prerequisites with them for this. Despite the challenges outlined above, they can implement the INCLUDE approach more easily and more quickly than large organisations and enterprises. This primarily has to do with the following characteristics:

### Smaller organisations can implement INCLUDE more quickly

- Customer proximity: they generally operate in greater proximity to their customers or target groups.
- Communication: the channels for communication and coordination are shorter.
- Orientation around activity: there is usually a 'culture of trying things out', even when it is not certain how good the result will be.
- Orientation around solutions: pragmatic action is more important than theoretical or ideological concerns.
- Structural level: there are fewer hierarchical levels and divisions whose collaboration must be coordinated.
- Flexibility: decisions can usually be made

<sup>1</sup> A comprehensive INCLUDE EQF curriculum that meets the requirements of the European Qualifications Framework for lifelong learning (EQF) is available free of charge to training providers in various languages (Bulgarian, English, German, Greek, Italian, and Polish). 'INCLUDE – Inclusive Leadership in the Digital Age. Content for Training Courses and Workshops': [http://link.emcra.eu/INCLUDE\\_Curriculum](http://link.emcra.eu/INCLUDE_Curriculum).

and implemented more quickly.

- Long-term orientation: there is greater intrinsic motivation both amongst the owners and in the leadership structures, mainly because the owners or founders are often the leaders carrying responsibility.

Leaders can put these advantages of SME, SMO, start-ups and many training providers to good use if they implement the INCLUDE approach in their organisation. The goal of the INCLUDE approach, especially that of the process models developed in this handbook, is to provide real support for development as a leader and for the development of an organisation.

There is an abundance of valuable suggestions, publications, and tools that exist for precisely this purpose. As far as possible, the INCLUDE approach has analysed important and useful information and selected it based on the following question: what will provide really effective support to leaders and everyone who wants to become one in their work in the age of digital transformation?

When analysing the current literature, one thing in particular became clear. Even very thorough approaches and concepts do not

### Tangible support with the implementation

answer one question in enough depth: 'How can I practically implement this in my organisation?'. There is a lack of tangible support, for example references to particularly useful tools and a concrete handbook showing when and how these tools can be implemented in practice. The INCLUDE approach takes this additional step so that leaders and organisations can thereby be as self-organised as possible and can make progress without the support of an external advisor.

In so doing, the INCLUDE approach has been shaped by the following key ideas:

- INCLUDE offers practical support that can be implemented free of charge by all users

directly at their place of work (work-based-learning approach).

- INCLUDE offers step-by-step instructions that provide all users with a structured approach that they can use for their personal development and also for the development of their organisations.
- INCLUDE should be implemented and understood as a holistic concept. Its implementation can, however, be carried out in smaller portions that can be more quickly integrated into processes at work, for example by applying individual tools.

# 04

## Challenges for Leadership in the Digital Age





## Eleven groups of challenges, clustered into themes // Challenges for leaders, teams, and organisations // the right tool for every challenge

Which challenges are leaders facing today? Anyone wanting to make a significant contribution to the development of leadership in the digital age must spend considerable time focusing on this question. The INCLUDE European project consortium analysed the relevant literature on this question and carried out numerous meetings, both online and in person, from 2019 to 2021 with thorough and substantial discussions. In autumn 2020, a three-day intensive workshop took place in Cyprus, where representatives from the four INCLUDE target groups from various European countries came together. These European user groups had also analysed and evaluated the challenges facing leaders in the digital age. In addition to this,

the INCLUDE approach was thoroughly tested in 2021 in five EU countries through online and in-person workshops with the INCLUDE target groups. The previously identified challenges were thereby re-examined and made more precise.

Based on this preparatory work, the central challenges for leaders in the digital age could be summarised into eleven thematic areas. These areas build on each other and contain some overlap. The following list can be read from the perspective of an organisation by going from the top to the bottom, or from a personal perspective as a leader by starting at the bottom and moving up to the top.

### Challenges: thematic areas

- Establishing and developing an organisation that is successful (in the market);
- Getting innovation underway and creating genuine added value for customers or target groups;
- Initiating, moderating, and leading processes of change;
- Creating the conditions for processes of change to take place more quickly and agilely;
- Understanding new technologies and using them to the organisation's advantage;
- Implementing decision-making processes that enable decisions in the entire organisation to be quick and, at the same time, more democratic;
- Sharing power and responsibility so that decisions can be made by those who are best suited to do so;
- Developing and leading teams that can attain their full potential;
- Developing relationships that are built on mutual respect and trust;
- Valuing and fostering diversity;
- Developing personally and continually learning.

### 4.1 Challenges for leaders in the digital age – eleven thematic areas

The individual thematic areas each contain several challenges. It is possible to spend a long time debating about the allocation of individual challenges and about their exact description. This process of discussion was drawn to a close when a list of challenges had been compiled that was sufficiently differentiated for all the developers involved in INCLUDE. At this point it was important to have a list of challenges for leaders in the digital age that was as comprehensive and tested as possible. On this basis it was possible to identify the INCLUDE areas of development on the one hand and the appropriate tools on the other to support leaders and their organisations in practice in a way that was as targeted and practical as possible.

### Establishing and developing an organisation that is successful (in the market)

- identifying the organisation's opportunities and risks;
- increasing the organisation's resilience;
- identifying and understanding the organisation's specific situation and role in a competitive environment;
- avoiding any waste of resources and saving costs;
- working out what should radically change about the business or organisational model;
- placing the needs of customers or target groups in centre stage;
- taking the needs of internal 'customers' and stakeholders into account;
- defining long-term goals for the organisation together;
- developing a mission and vision (further) and communicating them in a way that everyone can understand;

- analysing or redefining what the organisation does, how it does this, and why it does what it does.

## Getting innovation underway and creating genuine added value for customers or target groups

- creating the conditions for innovation;
- maintaining the ability to innovate, even if collaborative work is increasingly taking place online;
- inspiring and unlocking creativity;
- enabling an inspiring and self-fertilising exchange of ideas;
- enabling as many people as possible from the organisation to interact with external actors, customers, and target groups;
- establishing and maintaining partnerships with external organisations that are mutually beneficial;
- unlocking energy and potential in teams;
- making both success and mistakes or failures visible and learning from them;
- fostering a high level of initiative and courage to take calculated risks;
- increasing trust in the abilities of a group;
- supporting mutual learning in everyday situations;
- creating the requirements for the skills of all those involved to develop at an appropriate rate.

## Initiating, moderating, and leading processes of change

- reacting more quickly to internal and external changes;
- laying the foundation for a successful collaborative process of organisational change;
- being able to deal with adversity and unplanned events;
- driving change in the organisation forward

- with the help of the employees;
- developing self-organised teams that can introduce changes on their own initiative;
- organising projects and putting project teams together in such a way that they can successfully work together;
- supporting individual team members as they adjust to the change;
- supporting individual team members with individual changes and in important phases of their lives (for example promotion, returning to work after paternity or maternity leave, changing their role at work).

## Challenges for leaders, teams, and organisations

### Creating the conditions for processes of change to take place more quickly and agilely

- accelerating internal procedures and organisational processes;
- overcoming departmental egotism and silo structures;
- improving access to key information for everyone in the organisation;
- involving all participants or entire teams in problem-solving processes;
- solving complex challenges in the face of uncertainty and time pressure.

### Understanding new technologies and using them to the organisation's advantage

- analysing and understanding the opportunities and risks that arise from the technological developments of the digital age for organisations;
- moderating and shaping the digital transformation of the organisation;

- using and shaping new opportunities for collaborative work;
- effectively forming teams that work remotely or in a hybrid way;
- improving the virtual collaboration within individual teams and the organisation;
- selecting and effectively implementing the right tools for online communication;
- being able to confidently deal with challenging situations linked to working together online.

## Implementing decision-making processes that enable decisions in the entire organisation to be quick and, at the same time, more democratic

- making decisions inclusively with all participants;
- avoiding drawn-out discussions or voting processes when making inclusive decisions;
- choosing suitable people or putting together the right teams so that good decisions can be made;
- achieving a greater acceptance for decisions that have been made;
- making good decisions in uncertain situations;
- making decisions that anticipate future developments as thoroughly as possible;
- achieving a rapid implementation of decisions that have been made together.

## Sharing power and responsibility so that decisions can be made by those who are best suited to do so

- being prepared to forego power or decision-making ability;
- allowing teams or individuals that work directly for the customers or target groups

- to make decisions;
- accepting responsibility for decisions that have been made collaboratively and ensuring that all participants go along with these;
- distributing responsibility appropriately throughout the team or organisation;
- fostering proactive attitudes within the team or organisation so that people are happy to accept responsibility;
- fostering the commitment and autonomy of every individual;
- fostering the abilities of individuals and teams to shoulder responsibility;
- responding appropriately to the negative individual attitudes of certain people (felt powerlessness, passivity, resistance, avoidance of responsibility).

## Developing and leading teams that can attain their full potential

- increasing the effectiveness of collaboration within the team;
- recognising which different factors exert influence on a team and reacting appropriately to these;
- managing responsibilities so that they do not result in conflicts within the team;
- equipping teams with sufficient resources to be able to fulfil their tasks;
- strengthening the collaboration and solidarity within a team;
- understanding the different interests and needs in a group and dealing appropriately with these;
- allowing differing (content-related) positions to be expressed and resolving conflicts in a way that is constructive and focussed on finding a solution;
- avoiding or resolving unnecessary or petty arguments and conflicts;
- establishing and fostering functional voting processes in teams;
- creating clear rules for working together



that take the needs of both leader and team members into account;

- developing a team that is intrinsically motivated and avoiding the ‘carrot-and-stick’ approach.

### Developing relationships that are built on mutual respect and trust

- ensuring emotional security, primarily through trust and mutual understanding;
- communicating directly and without manipulation;
- giving positive and negative feedback appropriately and with a clear goal in mind;
- reacting appropriately to challenging situations that were caused by others;
- constantly improving communicative skills;
- developing and showing a genuine interest in the people that one works closely together with.

### Valuing and fostering diversity

- recognising and accepting different ways of working and approaches to specific tasks as added value;
- creating a working environment where all team members can act in accordance with their values and are respected for their uniqueness;
- being able to cope with intercultural differences;
- creating an inclusive environment where all participants can understand and deal with the different perspectives or personal limitations of other team members;
- being able to work in a diverse, internationally shaped environment.

### Developing personally and continually learning

- redefining one’s personal leadership style;
- gaining time to work more ‘on’ the organisation (structures, processes) instead of being primarily bound to the operational procedures;
- consciously calling one’s own convictions into question to create room for something new;
- avoiding micromanagement;
- understanding one’s own patterns of behaviour better;
- gaining better access to one’s own resources;
- finding suitable solutions for specific situations and challenges;
- coping better with stress and developing or strengthening one’s personal resilience;
- being able to live out one’s personal needs and values authentically in the working environment;
- developing a greater openness to both positive and negative feedback from others;
- developing greater impulse control;
- establishing or further developing a positive attitude towards oneself.

The following tables shows how the 27 INCLUDE tools are allocated to the eleven thematic INCLUDE areas. The 27 INCLUDE tools will each be briefly introduced in chapter 5. Among other things, the tools were selected in such a way that as many challenges as possible could be mastered with them. It was also important that each of the eleven areas were covered with different tools so that leaders using the INCLUDE approach have a choice and can ideally choose the tool or tools that are most promising in their specific situation.

With the identification of the challenges and their clustering into eleven thematic areas, all the requirements have been met for determining and describing the most important INCLUDE areas of development for leaders and organisations in chapter 5. In addition to this, the 27 tools will each be allocated to the area of development where they offer the greatest usefulness. The foundation has therefore been laid for developing the INCLUDE process model that helps leaders and their organisations to implement the INCLUDE approach one step at a time (see chapter 6).

## 4.2 INCLUDE challenges and INCLUDE tools

### Establishing and developing an organisation that is successful (in the market)

Challenges	BetaCodex	Open Space for Leaders	Life Positions	Cell Structure Design	Open Space for Organisations	Team Canvas	Golden Circle	Remote Work	Fuckup Nights	How to conduct online meetings	NAIKAN Method	Inner Drivers	Discounting
identifying the organisation's opportunities and risks	x	x		x	x				x				
increasing the organisation's resilience	x	x		x	x		x		x				
identifying and understanding the organisation's specific situation and role in a competitive environment		x		x	x		x						
avoiding any waste of resources and saving costs				x		x			x				
working out what should radically change about the business or organisational model	x	x		x	x		x						
placing the needs of customers or target groups in centre stage	x			x	x		x						
taking the needs of internal 'customers' and stakeholders into account	x			x	x	x							
defining long-term goals for the organisation together	x			x	x	x	x						
developing a mission and vision (further) and communicating them in a way that everyone can understand	x			x	x		x						
analysing or redefining what the organisation does, how it does this, and why it does what it does	x	x		x	x		x						

Figure 3: INCLUDE challenges and tools

### Establishing and developing an organisation that is successful (in the market)

Challenges	Scrum	Consent Decision-Making	Giving getting feedback	Drama Triangle	Consultative individual decision	Leader as a coach	Team contract	Unconscious bias	Inclusive power and authority	Delegation Board	Inclusive dialogue	Peer Consultation	Intercultural competences	Digital transformation tool
identifying the organisation's opportunities and risks		x			x									x
increasing the organisation's resilience		x			x									x
identifying and understanding the organisation's specific situation and role in a competitive environment														x
avoiding any waste of resources and saving costs		x			x		x							x
working out what should radically change about the business or organisational model									x					x
placing the needs of customers or target groups in centre stage	x				x									x
taking the needs of internal 'customers' and stakeholders into account	x	x			x		x		x	x	x			
defining long-term goals for the organisation together		x							x					x
developing a mission and vision (further) and communicating them in a way that everyone can understand		x												
analysing or redefining what the organisation does, how it does this, and why it does what it does		x							x					x

Figure 3: INCLUDE challenges and tools

## Getting innovation underway and creating genuine added value for customers or target groups

Challenges	BetaCodex	Open Space for Leaders	Life Positions	Cell Structure Design	Open Space for Organisations	Team Canvas	Golden Circle	Remote Work	Fuckup Nights	How to conduct online meetings	NAIKAN Method	Inner Drivers	Discounting
creating the conditions for innovation		x		x	x				x				
maintaining the ability to innovate, even if collaborative work is increasingly taking place online				x	x			x		x			
inspiring and unlocking creativity	x	x	x	x	x				x				
enabling an inspiring and self-fertilising exchange of ideas	x			x	x		x	x	x	x			
enabling as many people as possible from the organisation to interact with external actors, customers, and target groups	x			x	x								
establishing and maintaining partnerships with external organisations that are mutually beneficial				x	x								
unlocking energy and potential in teams	x			x	x	x		x		x			
making both success and mistakes or failures visible and learning from them	x				x				x				
fostering a high level of initiative and courage to take calculated risks	x	x			x				x				x
increasing trust in the abilities of a group	x			x	x	x							
supporting mutual learning in everyday situations	x		x					x	x	x		x	
creating the requirements for the skills of all those involved to develop at an appropriate rate	x	x		x	x								

Figure 3: INCLUDE challenges and tools

## Getting innovation underway and creating genuine added value for customers or target groups

Challenges	Scrum	Consent Decision-Making	Giving getting feedback	Drama Triangle	Consultative individual decision	Leader as a coach	Team contract	Unconscious bias	Inclusive power and authority	Delegation Board	Inclusive dialogue	Peer Consultation	Intercultural competences	Digital transformation tool
creating the conditions for innovation	x				x	x			x			x		x
maintaining the ability to innovate, even if collaborative work is increasingly taking place online	x	x	x		x	x						x		x
inspiring and unlocking creativity	x		x		x	x			x			x		
enabling an inspiring and self-fertilising exchange of ideas		x			x	x			x		x	x		
enabling as many people as possible from the organisation to interact with external actors, customers, and target groups									x					x
establishing and maintaining partnerships with external organisations that are mutually beneficial									x					
unlocking energy and potential in teams	x		x			x	x		x	x		x		
making both success and mistakes or failures visible and learning from them	x		x			x								
fostering a high level of initiative and courage to take calculated risks		x	x		x	x			x	x		x		
increasing trust in the abilities of a group	x	x				x	x				x	x		
supporting mutual learning in everyday situations	x		x	x	x	x					x	x		
creating the requirements for the skills of all those involved to develop at an appropriate rate			x			x					x	x		

Figure 3: INCLUDE challenges and tools

## Initiating, moderating, and leading processes of change

Challenges	BetaCodex	Open Space for Leaders	Life Positions	Cell Structure Design	Open Space for Organisations	Team Canvas	Golden Circle	Remote Work	Fuckup Nights	How to conduct online meetings	NAIKAN Method	Inner Drivers	Discounting
reacting more quickly to internal and external changes	x	x		x	x								x
laying the foundation for a successful collaborative process of organisational change	x	x		x	x		x		x				
being able to deal with adversity and unplanned events	x		x	x					x		x		x
driving change in the organisation forward with the help of the employees	x			x	x	x							
developing self-organised teams that can introduce changes on their own initiative	x			x	x	x							
organising projects and putting project teams together in such a way that they can successfully work together			x			x		x		x		x	x
supporting individual team members as they adjust to the change			x									x	x
supporting individual team members with individual changes and in important phases of their lives (for example promotion, returning to work after paternity or maternity leave, changing their role at work)			x					x				x	x

Figure 3: INCLUDE challenges and tools

## Initiating, moderating, and leading processes of change

Challenges	Scrum	Consent Decision-Making	Giving getting feedback	Drama Triangle	Consultative individual decision	Leader as a coach	Team contract	Unconscious bias	Inclusive power and authority	Delegation Board	Inclusive dialogue	Peer Consultation	Intercultural competences	Digital transformation tool
reacting more quickly to internal and external changes	x				x				x					x
laying the foundation for a successful collaborative process of organisational change		x			x				x					x
being able to deal with adversity and unplanned events	x	x	x	x	x	x						x		
driving change in the organisation forward with the help of the employees		x			x				x		x			
developing self-organised teams that can introduce changes on their own initiative	x	x			x	x	x		x			x		
organising projects and putting project teams together in such a way that they can successfully work together	x	x	x	x	x		x							
supporting individual team members as they adjust to the change			x	x		x		x		x	x	x		
supporting individual team members with individual changes and in important phases of their lives (for example promotion, returning to work after paternity or maternity leave, changing their role at work)			x	x		x		x			x	x		

Figure 3: INCLUDE challenges and tools

## Creating the conditions for processes of change to take place more quickly and agilely

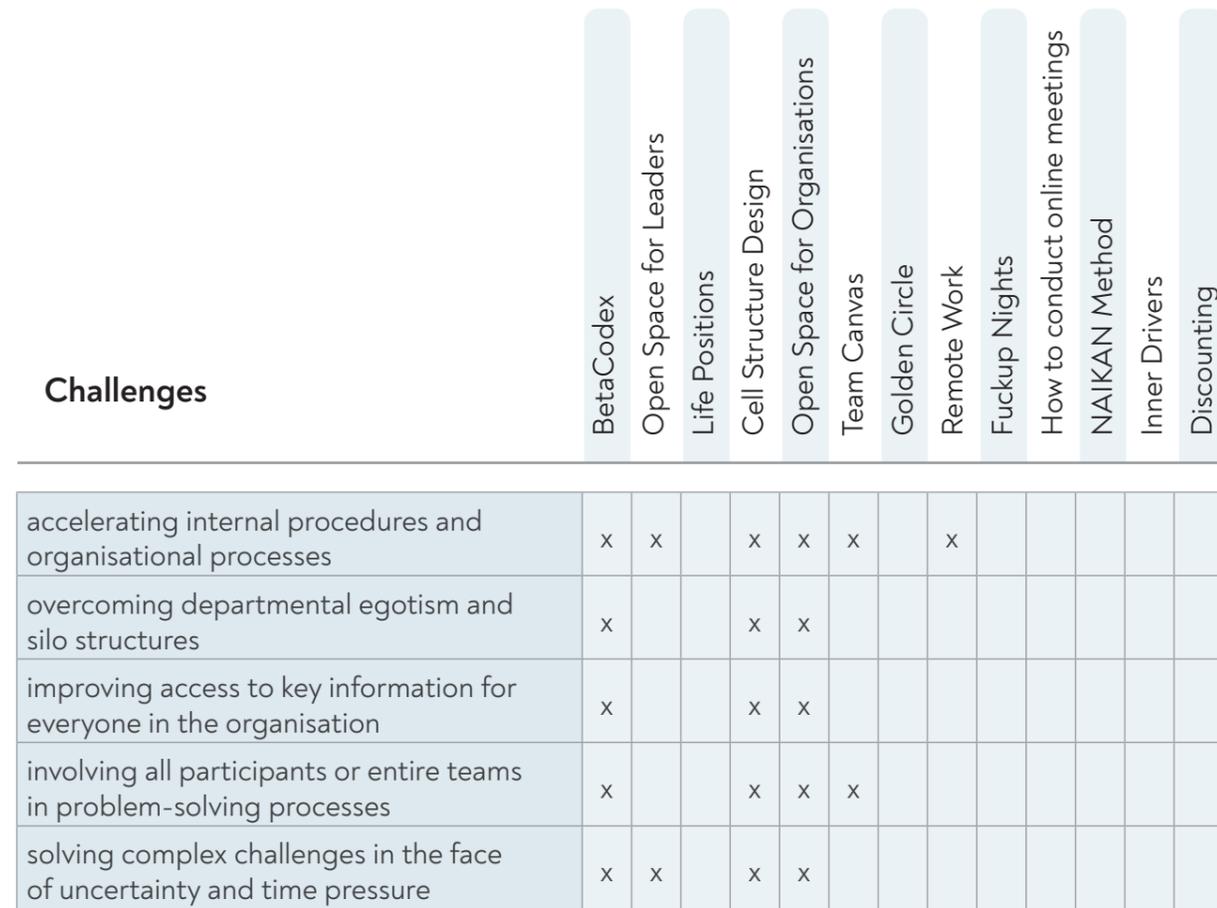


Figure 3: INCLUDE challenges and tools

## Creating the conditions for processes of change to take place more quickly and agilely

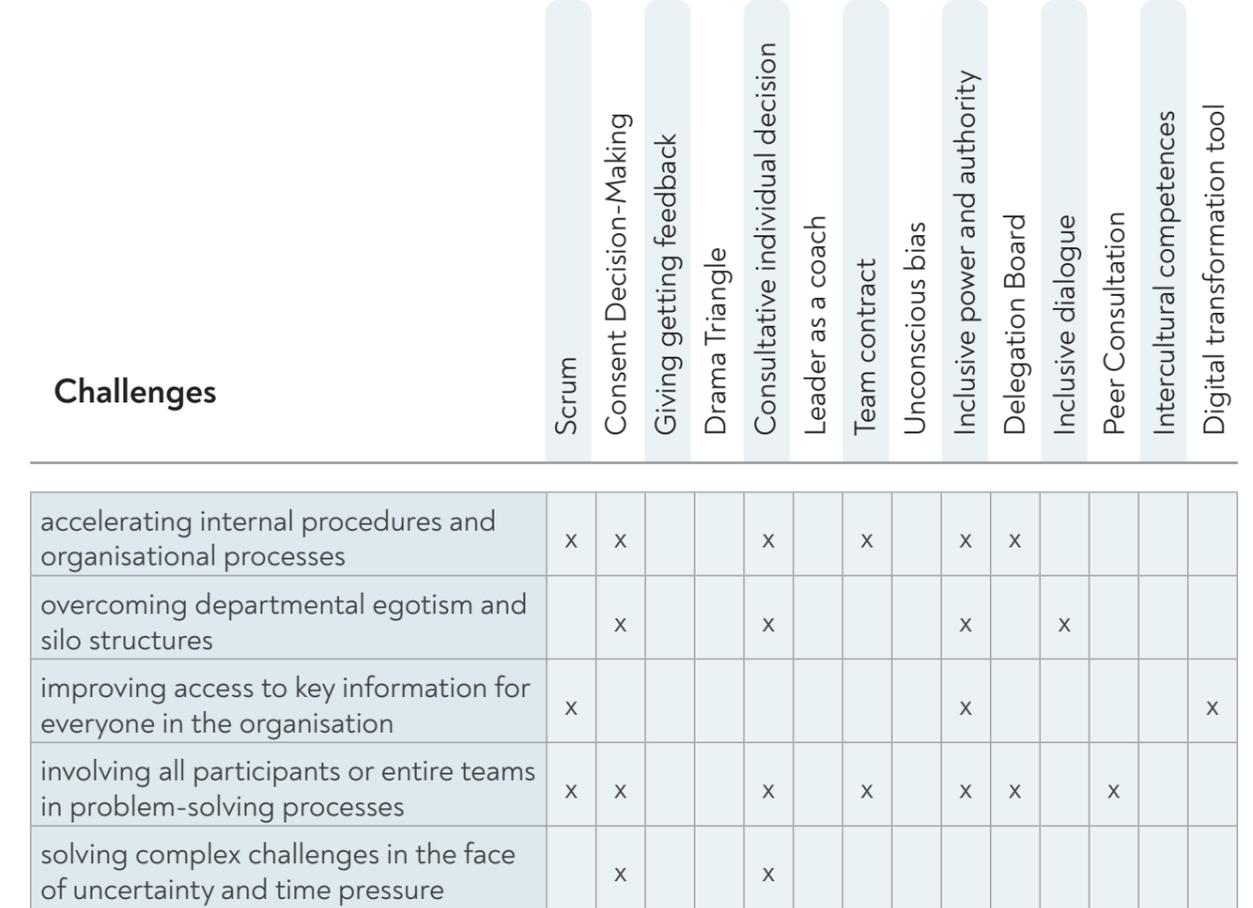


Figure 3: INCLUDE challenges and tools

## Understanding new technologies and using them to the organisation's advantage

Challenges	Tools												
	BetaCodex	Open Space for Leaders	Life Positions	Cell Structure Design	Open Space for Organisations	Team Canvas	Golden Circle	Remote Work	Fuckup Nights	How to conduct online meetings	NAIKAN Method	Inner Drivers	Discounting
analysing and understanding the opportunities and risks that arise from the technological developments of the digital age for organisations	x	x			x			x					
moderating and shaping the digital transformation of the organisation	x				x			x					
using and shaping new opportunities for collaborative work	x			x	x	x		x	x				
effectively forming teams that work remotely or in a hybrid way	x			x	x	x		x	x				
improving the virtual collaboration within individual teams and the organisation	x			x				x	x				
selecting and effectively implementing the right tools for online communication	x							x	x				
being able to confidently deal with challenging situations linked to working together online								x	x				

Figure 3: INCLUDE challenges and tools

## Understanding new technologies and using them to the organisation's advantage

Challenges	Tools													
	Scrum	Consent Decision-Making	Giving getting feedback	Drama Triangle	Consultative individual decision	Leader as a coach	Team contract	Unconscious bias	Inclusive power and authority	Delegation Board	Inclusive dialogue	Peer Consultation	Intercultural competences	Digital transformation tool
analysing and understanding the opportunities and risks that arise from the technological developments of the digital age for organisations														x
moderating and shaping the digital transformation of the organisation						x								x
using and shaping new opportunities for collaborative work	x	x			x		x			x		x		x
effectively forming teams that work remotely or in a hybrid way	x							x		x				
improving the virtual collaboration within individual teams and the organisation														
selecting and effectively implementing the right tools for online communication														
being able to confidently deal with challenging situations linked to working together online			x									x		

Figure 3: INCLUDE challenges and tools

Implementing decision-making processes that enable decisions in the entire organisation to be quick and, at the same time, more democratic

Challenges	BetaCodex	Open Space for Leaders	Life Positions	Cell Structure Design	Open Space for Organisations	Team Canvas	Golden Circle	Remote Work	Fuckup Nights	How to conduct online meetings	NAIKAN Method	Inner Drivers	Discounting
making decisions inclusively with all participants	x				x	x		x					
avoiding drawn-out discussions or voting processes when making inclusive decisions													
choosing suitable people or putting together the right teams so that good decisions can be made	x			x									
achieving a greater acceptance for decisions that have been made	x			x		x							
making good decisions in uncertain situations	x			x	x				x				
making decisions that anticipate future developments as thoroughly as possible	x	x			x								
achieving a rapid implementation of decisions that have been made together	x			x	x								

Figure 3: INCLUDE challenges and tools

Implementing decision-making processes that enable decisions in the entire organisation to be quick and, at the same time, more democratic

Challenges	Scrum	Consent Decision-Making	Giving getting feedback	Drama Triangle	Consultative individual decision	Leader as a coach	Team contract	Unconscious bias	Inclusive power and authority	Delegation Board	Inclusive dialogue	Peer Consultation	Intercultural competences	Digital transformation tool
making decisions inclusively with all participants	x	x			x				x	x	x			
avoiding drawn-out discussions or voting processes when making inclusive decisions	x	x			x						x			
choosing suitable people or putting together the right teams so that good decisions can be made	x				x	x					x			
achieving a greater acceptance for decisions that have been made	x	x			x				x		x			
making good decisions in uncertain situations	x	x	x		x	x						x		
making decisions that anticipate future developments as thoroughly as possible		x			x									
achieving a rapid implementation of decisions that have been made together	x	x			x									

Figure 3: INCLUDE challenges and tools

Sharing power and responsibility so that decisions can be made by those who are best suited to do so

Challenges	BetaCodex	Open Space for Leaders	Life Positions	Cell Structure Design	Open Space for Organisations	Team Canvas	Golden Circle	Remote Work	Fuckup Nights	How to conduct online meetings	NAIKAN Method	Inner Drivers	Discounting
being prepared to forego power or decision-making ability	x			x									
allowing teams or individuals that work directly for the customers or target groups to make decisions	x			x									
accepting responsibility for decisions that have been made collaboratively and ensuring that all participants go along with these	x			x	x	x							
distributing responsibility appropriately throughout the team or organisation	x			x		x							
fostering proactive attitudes within the team or organisation so that people are happy to accept responsibility			x		x							x	x
fostering the commitment and autonomy of every individual	x		x		x	x					x	x	x
fostering the abilities of individuals and teams to shoulder responsibility			x									x	x
responding appropriately to the negative individual attitudes of certain people (felt powerlessness, passivity, resistance, avoidance of responsibility)			x									x	x

Figure 3: INCLUDE challenges and tools

Sharing power and responsibility so that decisions can be made by those who are best suited to do so

Challenges	Scrum	Consent Decision-Making	Giving getting feedback	Drama Triangle	Consultative individual decision	Leader as a coach	Team contract	Unconscious bias	Inclusive power and authority	Delegation Board	Inclusive dialogue	Peer Consultation	Intercultural competences	Digital transformation tool
being prepared to forego power or decision-making ability	x	x			x				x	x				
allowing teams or individuals that work directly for the customers or target groups to make decisions	x	x			x				x	x				
accepting responsibility for decisions that have been made collaboratively and ensuring that all participants go along with these	x	x			x	x			x	x				
distributing responsibility appropriately throughout the team or organisation	x	x			x		x			x				
fostering proactive attitudes within the team or organisation so that people are happy to accept responsibility			x	x		x	x		x	x		x		
fostering the commitment and autonomy of every individual		x			x	x	x		x	x	x			
fostering the abilities of individuals and teams to shoulder responsibility						x					x			
responding appropriately to the negative individual attitudes of certain people (felt powerlessness, passivity, resistance, avoidance of responsibility)			x	x		x					x	x		

Figure 3: INCLUDE challenges and tools

## Developing and leading teams that can attain their full potential

Challenges	BetaCodex	Open Space for Leaders	Life Positions	Cell Structure Design	Open Space for Organisations	Team Canvas	Golden Circle	Remote Work	Fuckup Nights	How to conduct online meetings	NAIKAN Method	Inner Drivers	Discounting
increasing the effectiveness of collaboration within the team	x			x	x		x	x	x				
recognising which different factors exert influence on a team and reacting appropriately to these			x	x	x		x					x	x
managing responsibilities so that they do not result in conflicts within the team	x			x	x								
equipping teams with sufficient resources to be able to fulfil their tasks	x			x									
strengthening the collaboration and solidarity within a team					x	x		x		x			
understanding the different interests and needs in a group and dealing appropriately with these			x		x							x	x
allowing differing (content-related) positions to be expressed and resolving conflicts in a way that is constructive and focussed on finding a solution					x								
avoiding or resolving unnecessary or petty arguments and conflicts			x									x	
establishing and fostering functional voting processes in teams	x			x	x		x		x				
creating clear rules for working together that take the needs of both leader and team members into account	x			x	x		x		x				
developing a team that is intrinsically motivated and avoiding the 'carrot-and-stick' approach					x		x					x	

Figure 3: INCLUDE challenges and tools

## Developing and leading teams that can attain their full potential

Challenges	Scrum	Consent Decision-Making	Giving getting feedback	Drama Triangle	Consultative individual decision	Leader as a coach	Team contract	Unconscious bias	Inclusive power and authority	Delegation Board	Inclusive dialogue	Peer Consultation	Intercultural competences	Digital transformation tool
increasing the effectiveness of collaboration within the team	x	x	x		x		x	x		x	x	x	x	
recognising which different factors exert influence on a team and reacting appropriately to these				x		x	x	x			x		x	
managing responsibilities so that they do not result in conflicts within the team	x	x			x		x			x				
equipping teams with sufficient resources to be able to fulfil their tasks									x					
strengthening the collaboration and solidarity within a team	x	x	x			x	x	x	x		x	x	x	
understanding the different interests and needs in a group and dealing appropriately with these		x	x	x	x	x	x				x		x	
allowing differing (content-related) positions to be expressed and resolving conflicts in a way that is constructive and focussed on finding a solution	x	x			x		x				x		x	
avoiding or resolving unnecessary or petty arguments and conflicts			x	x		x	x	x			x		x	
establishing and fostering functional voting processes in teams	x	x			x		x			x	x			
creating clear rules for working together that take the needs of both leader and team members into account		x	x		x		x		x	x	x			
developing a team that is intrinsically motivated and avoiding the 'carrot-and-stick' approach		x							x		x			

Figure 3: INCLUDE challenges and tools

## Developing relationships that are built on mutual respect and trust

Challenges	BetaCodex	Open Space for Leaders	Life Positions	Cell Structure Design	Open Space for Organisations	Team Canvas	Golden Circle	Remote Work	Fuckup Nights	How to conduct online meetings	NAIKAN Method	Inner Drivers	Discounting
ensuring emotional security, primarily through trust and mutual understanding			x			x			x	x		x	x
communicating directly and without manipulation			x		x					x			x
giving positive and negative feedback appropriately and with a clear goal in mind													
reacting appropriately to challenging situations that were caused by others			x					x	x	x	x	x	x
constantly improving communicative skills			x					x	x		x	x	x
developing and showing a genuine interest in the people that one works closely together with			x								x	x	x

Figure 3: INCLUDE challenges and tools

## Developing relationships that are built on mutual respect and trust

Challenges	Scrum	Consent Decision-Making	Giving getting feedback	Drama Triangle	Consultative individual decision	Leader as a coach	Team contract	Unconscious bias	Inclusive power and authority	Delegation Board	Inclusive dialogue	Peer Consultation	Intercultural competences	Digital transformation tool
ensuring emotional security, primarily through trust and mutual understanding		x	x	x	x	x	x	x			x		x	
communicating directly and without manipulation		x	x	x	x	x	x	x			x	x		
giving positive and negative feedback appropriately and with a clear goal in mind			x			x		x			x			
reacting appropriately to challenging situations that were caused by others			x	x		x		x			x	x	x	
constantly improving communicative skills		x	x	x		x					x	x		
developing and showing a genuine interest in the people that one works closely together with			x	x		x		x	x		x		x	

Figure 3: INCLUDE challenges and tools

## Valuing and fostering diversity

Challenges	BetaCodex	Open Space for Leaders	Life Positions	Cell Structure Design	Open Space for Organisations	Team Canvas	Golden Circle	Remote Work	Fuckup Nights	How to conduct online meetings	NAIKAN Method	Inner Drivers	Discounting
	recognising and accepting different ways of working and approaches to specific tasks as added value			x									x
creating a working environment where all team members can act in accordance with their values and are respected for their uniqueness			x		x		x	x		x		x	
being able to cope with intercultural differences			x										
creating an inclusive environment where all participants can understand and deal with the different perspectives or personal limitations of other team members			x					x		x		x	
being able to work in a diverse, internationally shaped environment			x										

Figure 3: INCLUDE challenges and tools

## Valuing and fostering diversity

Challenges	Scrum	Consent Decision-Making	Giving getting feedback	Drama Triangle	Consultative individual decision	Leader as a coach	Team contract	Unconscious bias	Inclusive power and authority	Delegation Board	Inclusive dialogue	Peer Consultation	Intercultural competences	Digital transformation tool
	recognising and accepting different ways of working and approaches to specific tasks as added value			x			x					x	x	x
creating a working environment where all team members can act in accordance with their values and are respected for their uniqueness		x				x	x	x	x		x		x	
being able to cope with intercultural differences			x					x			x		x	
creating an inclusive environment where all participants can understand and deal with the different perspectives or personal limitations of other team members			x			x		x			x		x	
being able to work in a diverse, internationally shaped environment						x		x	x		x		x	

Figure 3: INCLUDE challenges and tools

## Developing personally and continually learning

Challenges	BetaCodex	Open Space for Leaders	Life Positions	Cell Structure Design	Open Space for Organisations	Team Canvas	Golden Circle	Remote Work	Fuckup Nights	How to conduct online meetings	NAIKAN Method	Inner Drivers	Discounting
redefining one's personal leadership style	x	x	x	x	x			x			x	x	x
gaining time to work more 'on' the organisation (structures, processes) instead of being primarily bound to the operational procedures	x	x		x	x								
consciously calling one's own convictions into question to create room for something new	x	x		x	x							x	
avoiding micromanagement	x			x		x		x		x			
understanding one's own patterns of behaviour better		x	x					x			x	x	x
gaining better access to one's own resources		x										x	x
finding suitable solutions for specific situations and challenges		x	x								x	x	x
coping better with stress and developing or strengthening one's personal resilience		x	x						x		x	x	x
being able to live out one's personal needs and values authentically in the working environment			x				x					x	x
developing a greater openness to both positive and negative feedback from others			x									x	
developing greater impulse control			x								x	x	x
establishing or further developing a positive attitude towards oneself			x								x	x	x

Figure 3: INCLUDE challenges and tools [back](#)

## Developing personally and continually learning

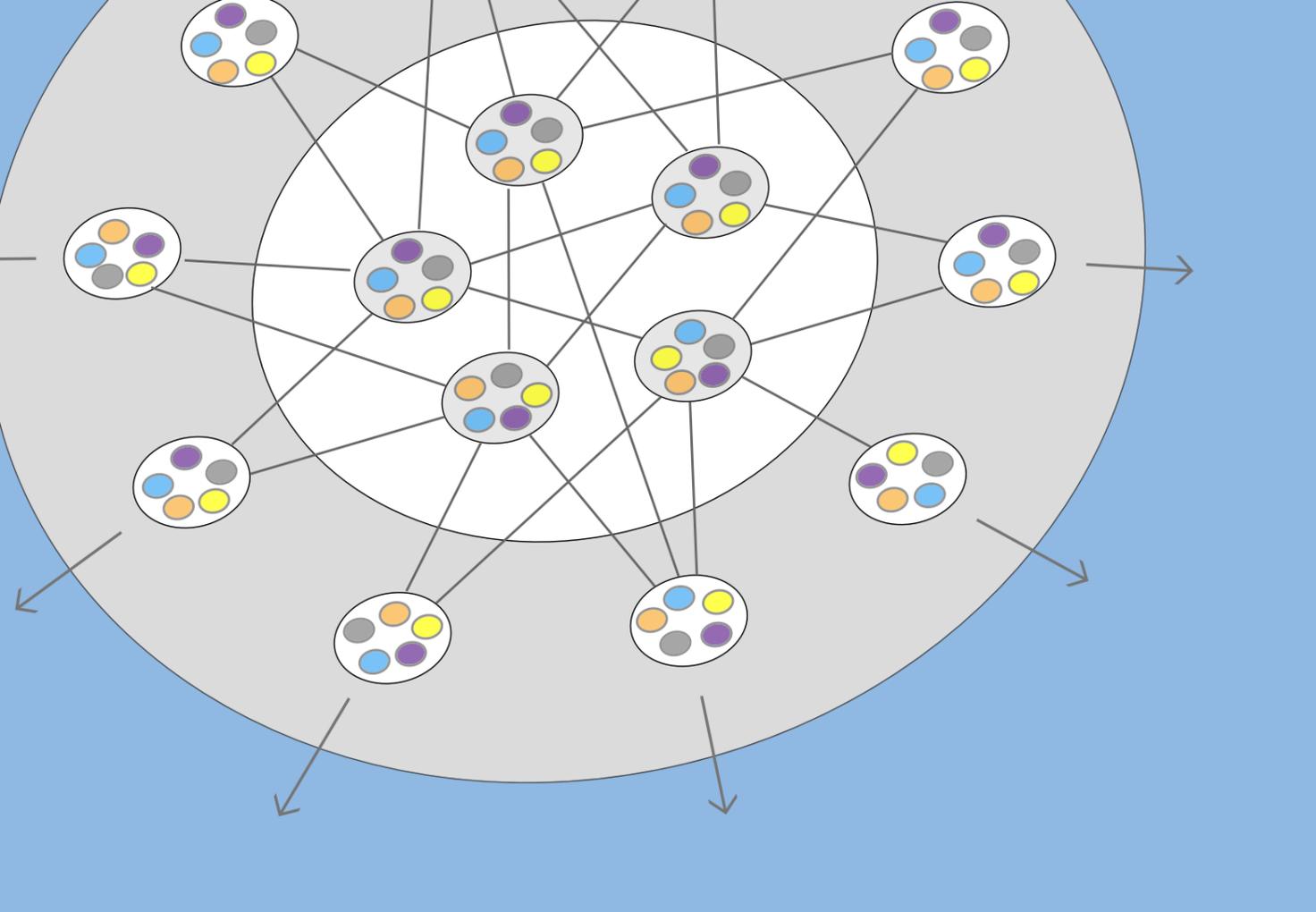
Challenges	Scrum	Consent Decision-Making	Giving getting feedback	Drama Triangle	Consultative individual decision	Leader as a coach	Team contract	Unconscious bias	Inclusive power and authority	Delegation Board	Inclusive dialogue	Peer Consultation	Intercultural competences	Digital transformation tool
redefining one's personal leadership style		x	x	x	x	x		x	x	x	x	x	x	
gaining time to work more 'on' the organisation (structures, processes) instead of being primarily bound to the operational procedures		x			x				x	x		x		
consciously calling one's own convictions into question to create room for something new		x	x	x	x			x	x		x	x	x	
avoiding micromanagement					x	x	x			x		x		
understanding one's own patterns of behaviour better			x	x				x						
gaining better access to one's own resources			x	x				x				x		
finding suitable solutions for specific situations and challenges			x	x				x				x	x	
coping better with stress and developing or strengthening one's personal resilience				x										
being able to live out one's personal needs and values authentically in the working environment				x							x		x	
developing a greater openness to both positive and negative feedback from others			x	x							x		x	
developing greater impulse control			x	x				x						
establishing or further developing a positive attitude towards oneself				x										

Figure 3: INCLUDE challenges and tools [back](#)

# 05

## Theoretical Foundations and Practical Methods and Tools for INCLUDE





## 5.1 Theoretical foundations of INCLUDE

### Inclusive leadership plus

The 'inclusive leadership' concept has already been introduced in chapter 2 (School for Leaders Foundation/Alp/EU-Fundraising Association 2018). The concept's starting point and foundation is the thesis that everyone in an organisation can be a leader. 'Inclusive leadership' stretches the term 'leadership' and supports or even demands that everyone in an organisation contributes. The result is that the traditional dichotomy between leaders and followers disappears. A change of roles is possible and sensible.

The following definition of 'inclusive leadership' also serves as the foundation for INCLUDE:

'Inclusive leaders embody a leadership approach that appreciates diversity, invites and welcomes everyone's individual contribution, and encourages full engagement with the processes of decision-making and shaping reality. The aim of inclusive leadership is to create, change and innovate whilst balancing everybody's needs' (School for Leaders Foundation/Alp/EU-Fundraising Association 2018: 5).

In this definition, the systemic challenges of leadership have already been hinted at. The 'inclusive leadership' approach does not, however, do complete justice to the challenges facing leaders in the digital age. On the one hand, there is the obvious lack of focus on the topic of technological developments. On the other hand, something which is not so easily discernible is the approach's partial blindness to organisational structure and processes.

'Inclusive leadership' comes up short in these areas. The focus is primarily on the question of how leaders can shape their relationships with their employees so that they achieve good results together. The leader, as the person in need of development, is thereby firmly in centre stage. Questions about organisational structure and working processes within an

organisation are ignored to a large extent.<sup>2</sup>

When leadership is reduced to mainly leaders and their teams, the result is a superficial analysis. For a successful process of change in the direction of inclusive leaders, there must be action on all levels of an organisation. Leadership and organisational development – they only work in tandem.

**Leadership and organisational development – they only work in tandem**

Why is this the case? It is very simple: just like good software based on a poor analogue process will not make a good digital process, so it is also unlikely that simply using approaches such as work-life-integration or mindfulness will make a more inclusive organisation out of a hierarchical one. These concepts have their justification and can be sensible and effective – but only if the necessary structural and organisational foundation are being laid in parallel. Otherwise, it is true to say, as Peter Drucker so clearly expressed: 'Culture eats strategy for breakfast.'

Wherever leaders focus solely on themselves and the people in their immediate surroundings, new agile or self-organised methods, for example, will quickly butt up against ongoing hierarchical systems with inflexible structures and processes. When this happens, it is generally true to say that the old system will win.

<sup>2</sup> This fact is one reason for a portion of the experts that were already involved in developing the 'inclusive leadership' approach to drive forward its development within the framework of the INCLUDE approach. During the 'inclusive leadership' project it became clear that many of those who are professionally addressing the topic of leadership concentrate solely on leaders and their teams. Other factors such as structures, processes, or external conditions are disregarded. The INCLUDE consortium were able to successfully position leadership on this broader basis.

Inclusive leadership plus // Complex vs. complicated // Sociocracy, holocracy, Laloux as quarries // The choice between Alpha and Beta // Communication and needs // Deliberately taking risks // Really seeing through decision-making situations // Five INCLUDE areas of development // 27 INCLUDE tools

Leadership and management are primarily practices to lead organisations effectively. It may be better to talk about them both in terms of a craft. Fredmund Malik summarised this succinctly for the area of management (Malik 2005). Leadership is also a craft that must prove itself afresh every day in an organisation's practice.

At the same time, it is important to approach the topic of leadership from the basis of a broad theoretical foundation. Why? The challenges for leaders in the digital age are so diverse that access to theoretical concepts and the methods built on them in a way that is as broad and open as possible is the only

viable way to meet these challenges. Different thematic areas are involved in this: psychology, communication, the way social systems function, decision-making theory, risk theory etc.

This world of theory was systematically scanned and evaluated for INCLUDE. The most important foundations for the INCLUDE approach are briefly outlined below. Each topical area merits far more comprehensive study. It is therefore particularly recommended for leadership practitioners to delve into this area of knowledge in more depth. There is much to discover.

Real change cannot be brought about without developing organisational structures.

## System analysis – simplification is good, but it shouldn't go too far...

Modern organisations are not the machines that they were generally understood to be in Taylor's time. Modern organisations and enterprises are complex systems. Anyone who wants to understand the impact of this on the topic of leadership needs to be clear about the difference between a complicated and a complex system (cf. for this section especially Sassenrath 2017: 48ff).

An engine is a complicated system. It requires complicated control that lay people are unable to understand. An expert in this area, however, knows exactly how a combustion engine works and what must be done for the engine to run.

**Complex systems should ideally manage themselves**

Wherever people are in the centre, we are usually dealing with complex systems. And when people are involved, the results of interventions cannot be reliably predicted. This raises the question of how complex systems can be managed. System analysis provides the following answers to this question: first, the management of a complex system must not be less complex than the system itself. Second, complex systems should ideally manage themselves. This means, for example, that a subordinate unit in an organisation should only involve a higher level if they are unable to solve a challenge themselves.

INCLUDE views the tasks of leaders in the digital age as work in a complex system. They are therefore not in the complicated world of engineers that can be predicted mathematically. This is the world of physics, a world of planning and order. Inclusive leadership must

prove itself in a complex world. This world is the world of psychology, medicine, biology, economic and social sciences. In this world people must feel their way forward. It is a world of trial and error, unpredictable and disordered. Decentral management is better suited to this complex world than authoritative top-down leadership.

## 'Safe enough to try' and 'good enough for now'

INCLUDE processes well-known approaches to self-organisation and participation. Particular factors in the conception of INCLUDE were basic considerations from sociocracy, holocracy, and from the 'reinventing organisations' approach of Frederik Laloux (cf. especially Rütger 2018 on this).

Sociocracy is an organisational concept that places consistent focus on self-organisation. The approach is based on insights about managing dynamic processes (cybernetic). One of the central premises of sociocracy is: 'it is safe enough to try' and 'good enough for now'. These maxims for acting and making decisions have been explicitly assumed in INCLUDE.

The holocracy approach is an adaptation of sociocracy. In holocratic organisations, there are no traditional hierarchies, leaders, or titles. The responsibility for leadership is distributed across the entire organisation with the help of self-organising teams.

**Sociocracy, holocracy, Laloux – valuable 'quarries' for INCLUDE**

'Reinventing organisations' from Frederik Laloux (2016) is an evolutionary organisational concept, reminiscent of the 'spiral dynamics' approach developed by Don Beck and Chris Cowan on the foundation of theories from Clare W. Graves. Laloux did not admittedly orient himself explicitly around 'spiral dynamics' by his own admission (Rütger 2018: 289). Laloux

distinguishes between various levels of an organisation's development. The focus in this is outlining the step towards organisations that work in a fundamentally different way to traditional hierarchical systems.

INCLUDE uses the 'organisational blueprints' of these three approaches as inspiration. Unlike sociocracy and holocracy, INCLUDE has no intention of developing a finished organisational form. For INCLUDE's target groups it is generally not practical to 'impose' one of these organisational models. This kind of approach would also be the precise opposite of the complex self-management postulated above. In contrast to this, INCLUDE suggests a processual approach for which the concepts of sociocracy, holocracy, and those of Laloux offer very valuable 'quarries'.

## Work the system! Beta – Open Space - Agile

The work of Silke Hermann und Niels Pfläging (2020; Pfläging/Hermann 2020), as well as that of Daniel Mezick and his colleagues (Mezick et al 2015) formed an important methodological basis for INCLUDE. These authors managed to integrate the Open Space approach from Harrison Owen (2012) into a processual process of organisational development in such a way that Open Space can come fully into its own and, at the same time, an agile approach to organisational development is enabled.

The organisation as a whole takes centre stage here. These approaches are therefore not explicit leadership approaches, although the changed role of managers is clearly mentioned again and again. The authors are concerned with working on the organisation's system. This is therefore also a core task of leadership.

A core foundation of Hermann and Pfläging's considerations are the 12 principles of the BetaCodex (The BetaCodex Network), which have already been outlined in chapter 2. If there is a BetaCodex, what is 'Alpha' in contrast? In short, much of what is still taught in business studies courses today and what most managers consider to be their tools of the trade.

The 'alpha world' relies on rules and laws. The principles of the 'beta world' stand in stark contrast to this. Rigid rules and laws have their justification, of course, but they are cumbersome and of little use when unknown or new things happen. In order to make rules, possible contingencies have to be known or taken into account. Alpha is built around instruction and control. In both large and small alpha organisations, decisions are made and answered for on the leadership level.

**Everyone has a choice between Alpha and Beta**

Principles, by contrast, can always be applied. This is even true in new circumstances and challenges. This makes principles robust to change. They can and must be interpreted against the background of new situations. They still provide orientation, however, especially in a rapidly changing environment. In addition to this, beta principles are better understood as a state of mind. They do not offer a patented solution or a simple 'yes' or 'no'. They cannot be applied and implemented without careful thought, but they are like the crash barriers on a motorway that help one not to career off the road. Another characteristic of a beta organisation is that decisions are made by those who are as close as possible to the customers or the target group. This so-called 'periphery' in an organisation, for example teams with direct contact to customers, make decisions in a self-organised way while the 'centre' takes on the role of an internal service provider for those who actually interact directly with the customers (Pfläging/Hermann 2020).

Institutional change – permanent beta – can be achieved by building on this foundational concept and by consistently integrating Open Space and agile approaches. In this way, ongoing iterative progress while at the same time improving the organisation's functionality becomes possible. Phase 2 of the INCLUDE step-by-step approach (cf. chapter 6) in particular is based on the work of Hermann, Mezick,

Owen, Pfläging and the many thinkers who have inspired them.

## On leaders and people – psychology and communication

The systemic component of INCLUDE has been sufficiently underpinned and justified by the approaches outlined so far. However, without leaders who will seize these arguments and ideas and everyone else involved in the organisations being open to thinking differently, inclusive leadership cannot become a reality in the digital age. Achieving this requires an entry into the world of psychology and communication.

There are always those who act, lead or allow themselves to be led, who accept or reject responsibility, who exercise, share or forego power, who know and understand themselves or are ‘remote-controlled’ by their psychological dispositions without even realising it. There are those who trust or distrust each other, who only ‘play’ their roles instead of actually filling them, or who act courageously or end up hesitating in times of change.

For its analysis of interactions between leaders and those in their organisations, INCLUDE has made particular use of the approaches of transactional analysis and nonviolent communication.

Transactional analysis (TA) focuses on the question of why people feel, think or behave the way they do. TA analyses interpersonal communication. In TA, communication is labelled as a transaction. Transactional analysis was founded in the previous century by the American psychiatrist Eric Berne and has since become an influential field of psychology across the world. One of the goals of TA is to provide understandable concepts for the analysis, reflection and change of human behaviour and for the interaction between people. At the same time, TA approaches include the observation and development of people in social systems, including group dynamics and the influence of individuals in and on social systems (cf. Berne 1983 and 2002; Bhonsle 2018; Kahler 1978; Karpman 2014; Mellor/Schiff

1975; Stewart/Joines 2012; West 2020).

## How people communicate and what they need

INCLUDE draws on the model of ‘nonviolent communication’ (NVC) for specific aspects of communication, for example when giving and getting feedback. This concept was developed by Marshall B. Rosenberg (2012 and 2015). NVC assumes that violent strategies – whether verbal or physical – are learned behaviours that are taught or supported by the prevailing culture. NVC is also based on the assumption that all human beings have the same basic human needs and that all human actions serve to satisfy one or more of these needs. By applying ‘nonviolent communication’ people can achieve greater authenticity in their communication, a better understanding of others, closer connections to each other and better solutions to conflict.

## Mastering complexity – deciding better – increasing resilience

The digital age brings new opportunities and risks that inclusive leaders, teams, and entire organisations must face. Successful leadership therefore also means focusing on the resilience and sustainability of an organisation as a leader and increasing these as much as possible.

INCLUDE uses various theoretical concepts that support or expand each other to achieve this goal. The foundation for this is a fact-based worldview that allows an understanding of reality, as far as possible, as it really is (Rosling/Rosling Rönnlund/Rosling 2018). The use of appropriate heuristics will be of particular help to organisations in decision-making situations that, like the INCLUDE target groups, usually only have limited financial and human resources (cf. chapter 3). Leaders who deal with the topic of heuristics can increase both their personal risk competence and that of their own organisation collectively (Gigerenzer 2008, 2015 and 2020).

The vast majority of decision-making situations

faced by leaders and their teams, for example when it comes to using new digital technologies, are complex and uncertain. This makes it all the more important for all those involved to really see through a decision-making situation (Kahneman 2012; Kahneman/Sibony/Sunstein 2021). And even though prognoses should generally only be made with a great deal of caution and care, there are approaches that enable much better predictions, at least in the short and medium term. These rely on systematic and iterative action, among other things. There are also research results that show that diversely composed teams can make better prognoses than individuals under certain conditions. The most important prerequisites for this are a team culture that allows for ‘constructive dispute’. Another prerequisite is that all team members feel psychologically secure and that their cooperation is characterised by mutual appreciation and personal interest towards each other (Tetlock/Gardner 2016).

## Really seeing through decision-making situations

Leaders who, together with their team, finally try to understand how organisations can best be prepared for unexpected events are on the best path towards dealing constructively with the complex challenges of the digital age. Increased decentralisation is a key concept here. With decentralised structures, better conditions are created for ensuring an organisation’s long-term survival (Taleb 2014).

## 5.2 Five INCLUDE areas of development and 27 tools for practical implementation

Not all challenges or all eleven thematic blocks for leadership in the digital age which were identified in chapter 4 are equally relevant for every organisation. It was an important aspiration of the INCLUDE team to define the broadest possible overarching areas of development that were both appropriate for

the INCLUDE target groups and suitable for organisations outside these target groups. When designing these areas of development, INCLUDE was able to build in particular on the results of the EU project ‘Inclusive Leadership’ (see above and School for Leaders Foundation/Alp/EU Fundraising Association 2018).

When choosing suitable and practical tools for the various INCLUDE areas of development, there were three central criteria:

1. Does the tool fit with the INCLUDE’s inclusive aspirations for leadership? For this choice the definition of ‘inclusive leadership’ already introduced above was used as a benchmark.
2. Does the tool make a significant contribution with regards to the theoretical aspirations for leadership and organisational development outlined above?
3. Is the tool useful for leaders and organisations as they deal with the specific conditions and challenges of the digital age?

The selection process took place in 2020 and 2021. The approach was iterative. Phases of theoretical conception and discussion were followed by practical tests that led to a revision and further development of INCLUDE’s theoretical foundations. It was possible to repeat this process several times with varying levels of intensity.

## Overview: the five areas of development for inclusive leadership in the digital age

INCLUDE distinguishes between five areas of development in which leaders can evolve to be effective in the digital age. These five areas of development are:

- ‘leader’ – self-reflection and self-awareness;
- ‘people’ – developing relationships;
- structure – I, my team, and my organisation;
- ‘process’ – living a shared vision and creating change;
- ‘technology’ – dealing with the driving forces that change the world.

All five INCLUDE areas of development work together and complement each other. For example, increased self-organisation (see area of development ‘process’) is only possible if more trust is built up in each other (see area of development ‘people’) and the formal exercise of power (see area of development ‘structure’) is limited. In addition, INCLUDE leaders need a pronounced ability to assess opportunities or risks, as well as to assess the impact of technical innovations on their own organisation (see area of development ‘technology’). They also need good self-awareness, especially with regard to their own abilities and limitations (see area of development ‘leader’).

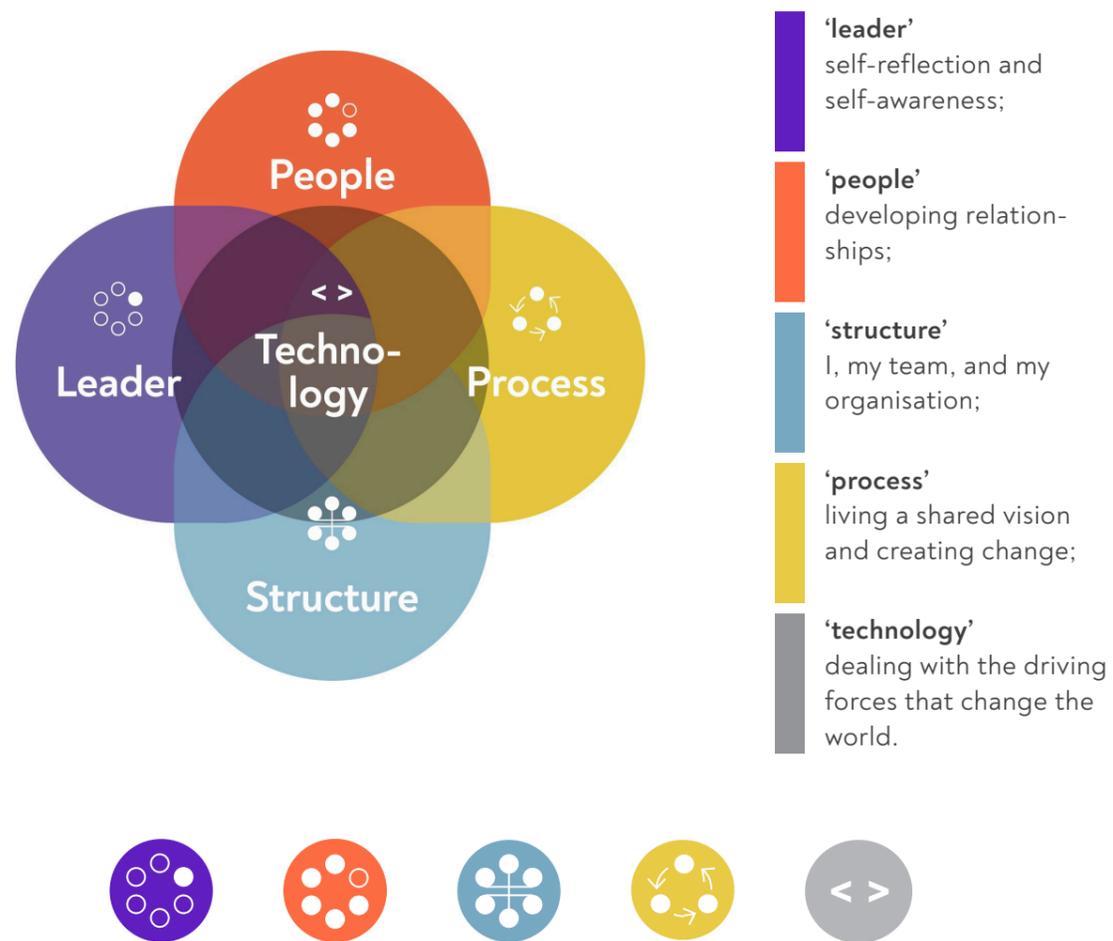


Figure 4: Five INCLUDE areas of development

## Area of development 1: ‘Leader’ – self-reflection and self-awareness

In the digital age, leadership with regard to the further development of one’s own person means critically reflecting on one’s own behaviours and roles in the company or organisation. Digital transformation starts with each individual personally.

In this area of development, it is about having the courage to engage in self-exploration and to examine one’s own patterns of thinking and behaviour. Knowing oneself better is a prerequisite for developing as a leader. Leaders should be particularly encouraged to act more authentically as people. This reduces stress caused by the fact that people often feel compelled to play a certain role in their professional positions. If one consciously chooses not to play a role, work can come more easily. In addition, cooperation with colleagues can change positively. The point is to make sure that leaders personally are doing well at their workplace. However, no one can take the responsibility for this away from the leader (see School for Leaders Foundation/Alp/EU-Fundraising Association 2018).

### Area of development ‘leader’

At the core of the ‘leader’ area is the question **of the extent to which a leader in the digital age is prepared to develop further and change their behaviour if necessary. Self-reflection is a central concept for this** and the starting point for all further initiatives linked to dealing with the challenges of the digital age. The following applies: Before anyone can successfully lead their organisation through the digital age, they must become aware of their previous behaviour as a leader. Before the digital transformation of the organisation comes a very personal mental transformation. New leadership behaviour always starts with oneself. To adequately face the challenges of the digital age it is not enough to work on the right adjustment points

in an organisation or on the decision-making processes. Leaders should be working through a personal process of development at the same time.

**Another key concept when someone starts this engagement with themselves is learning.** Leaders will get to know themselves better and learn new behaviours, tools and methods that change and improve their leadership behaviour. Learning also includes the willingness to **actively unlearn** ingrained and possibly no longer suitable behaviours or to replace them with new or more suitable ones.

There is also much to discover **in the area of relationships with employees, superiors and colleagues.** The **central concept** here is **authenticity**. INCLUDE leaders have the chance to take off the mask that so many people put on almost as a matter of course in their working lives. Instead of playing a role, they can increasingly be themselves. Personal interaction with others in the organisation becomes more relaxed and trusting.

For many INCLUDE leaders, being authentic also means admitting to themselves that they are at least partially overwhelmed as leaders by the current upheavals of the digital age. If they learn to better assess their own limits, then it will be easier for them in the future to allow more decentralised decisions as leaders, for example, and to no longer want to control everything and everyone. Instead of hubris, which characterizes so many leaders (Kruger/Dunning 2009), INCLUDE leaders practice active self-restraint. When it comes to traditional leadership, less is more in the digital age. Paradoxically, this is what makes them truly effective as leaders again.

To make it easier for leaders to embark on the journey towards themselves, they can keep in mind what their future prospects are: One will achieve better results as an INCLUDE leader and will have to work less hard to do so. The goal is to work successfully and live better. Life is too valuable to let it be dominated by an outdated work environment. For their own sake, leaders should take the pressure out of their work life. They can only do this if they first



get to know themselves better and decide for themselves what they want to do differently in the future.

Any leader who is not yet convinced that now is exactly the right time to decide on new leadership behaviour should perceive our digital age for what it is. A radical upheaval of all existing conditions. Digital transformation is a revolution. It is revolutionising the way we work together in the future. Our old „factory system,“ which served as a model in this way not only in production but also in all office activities, has had its day. For example, workers no longer need to congregate in open-plan offices in office complexes to work effectively. The world is becoming remote and INCLUDE leaders can successfully lead or operate in this new world order. The digital revolution is also rapidly changing the way we work. Every leader must decide for themselves whether they want to take action now or will have to react later.

## Tools for practically implementing area of development 1 ‘leader’

The following tools are particularly well suited to supporting leaders in their practical growth in the area ‘leader’. In addition to this, each tool is suitable for one or more other areas of development. These additional applications will also be mentioned.

### Open Space for Leaders

Open Space for leaders takes the advantages of the Open Space method (cf. Owen (2012); see area of development ‘structure’), that was originally designed for larger groups, and opens them up for individuals or small leadership teams to enable them to have better solo or team retreats. The approach is always well suited for times when leaders personally or their organisations are faced with a complex challenge, for example if they want to develop their style of leadership or if something fundamental has to be changed or developed in

their organisations. Open Space for leaders combines the power of focussed individual work with the openness and agility of the Open Space methods for organisations. This method was newly designed for the INCLUDE approach.

In its traditional area of application, Open Space has led to numerous deep-seated changes and developments across the globe. Before anyone conducts a personal retreat with the principles of Open Space, they should first take time studying in detail the Open Space approach for organisations (see area of development ‘structure’). That will also help to decide whether this approach could be useful not just for them as an individual but also for the development of their organisation.

The tool Open Space for Leaders can also be used with challenges in the areas of development ‘people’, ‘structure’, ‘process’, and ‘technology’.

## Tools for area of development ‘leader’

### Life Positions

This approach belongs to transactional analysis (see above). In essence, it can be described as follows: When people meet each other, they can think of themselves as being OK or as not being OK. They can also think the same about the other person. This means it is possible for people to adopt 1 of 4 different attitudes:

- I am OK - You are OK
- I am OK - You are not OK
- I am not OK - You are OK
- I am not OK - You are not OK

When working with others, the assumptions people make about themselves and others

are often more important than what they say.

These implicit beliefs influence the climate of conversation (inclusive or exclusive), the way people communicate, and the quality of the solutions that are found. Healthy communication and true understanding are only possible in the first situation: ‘I am OK – You are OK’.

No one always has the attitude: ‘I am OK - You are OK’. The key lies in self-awareness, in observing one’s own attitude in each situation and being able to think about oneself and about other people in terms of ‘OK’.

The tool Life Positions can also be used with challenges in the area of development ‘people’.

### NAIKAN Method

The NAIKAN method enables in-depth self-reflection about one’s behaviour towards other people. It comes from a Japanese tradition. In Japanese, the word „NAI“ means „inside“, and „kan“ means „insight. NAIKAN therefore means to look inside. Focusing on three simple questions allows leaders to develop their leadership skills as they look at themselves, their reactions, emotions, and behaviour towards other people.

With the NAIKAN method one can look at past actions not from one’s own perspective but through the eyes of others. This method consciously abandons the habitual assumption that others are the cause of one’s own problems, thereby helping leaders to avoid automatically blaming others for their actions.

In difficult situations, people usually look for the reasons for their behaviour in external circumstances. They justify their behaviour by the situation in which they find themselves or based on how others have acted in the past. Meanwhile, people who observe the problem from the outside with the help

of the NAIKAN method are more likely to see reasons for that behaviour in their own character traits. The habit of blaming others for their reactions brings temporary relief. In the long run, however, it leads to people no longer managing themselves and losing the ability to respond adequately to new situations.

The tool NAIKAN Method can also be used with challenges in the area of development ‘people’.

### Inner Drivers

The concept of Inner Drivers was originally developed in the 1970s by Taibi Kahler. It is a component of transactional analysis (see above). In summary form, the approach can be outlined as follows: in stressful situations, everyone has their habitual behaviours with which they want to regain control in the situation and return to balance. In such moments, automatic, often unconscious reactions occur, which are not the best strategies for meeting a challenge in a solution-oriented way. These ways of behaving are triggered by compulsive rules such as „You should...“, „You must...“, „Be...“ and are called inner drivers.

Drivers help to understand why people behave illogically and unfavourably in certain work situations and why they maintain these behaviour patterns despite negative experiences. They may keep looking for comfort, for example, even if the situation requires confrontation.

When leaders are aware of what triggers their personal stress will allow them to lower the tension and take back control of their inner driver so they can respond more effectively to stressful situations. When leaders know their own drivers, they can better understand what impacts the way they manage their time, collaborate, and connect with others, for example.

There are 5 inner drivers that prompt



people to act and that lead to dysfunctional behaviour. These are the following imperatives or so-called dogmas:

- Hurry up!
- Be perfect!
- Please others!
- Be strong!
- Try hard!

These five drivers can be found to a greater or lesser extent in the behaviour of every human being. Each individual will have a combination of dominant and subordinate drivers. People do not constantly react under the influence of their drivers. They become particularly powerful when things do not go according to their expectations, thereby causing stress or tension.

The concept of Inner Drivers can also be used with challenges in the area of development 'people'.

## Drama Triangle

The concept of the Drama Triangle was developed by the psychologist Stephen Karpman (2014) and is part of transactional analysis (see above). In order to understand it, it is first necessary to be clear about how 'healthy' relationships within a team can be characterised:

- every member of the team takes responsibility for their own needs, feelings, and reactions.
- no one feels responsible for the needs, emotions, and reaction of others.
- the team members know their own competences, skills, and limits, as well as those of their co-workers, and show respect and appreciation when interacting with each other.
- everyone interacts with others with the attitude "I am OK – you are OK" (cf. tool Life Positions).

That is the theory. In practice, all team members will not always behave in line with these rules of communication. When it comes to interpersonal communication, so-called psychological games are often played. Psychological games are a concept from transactional analysis, which states that communication between people will end with a particular predictable result. These games follow an unconscious pattern of communication that leads at least to uncomfortable feelings, and often even leaves a feeling of triumph on the one side and of defeat on the other. On the relational level, everyone involved ends up losing since games prevent nearness and autonomy.

Games are unconscious forms of communication that people use to create and repeat situations which confirm their perceptions of themselves, others, and the world – perceptions that they formed in their early childhood. Games promise a perceived advantage for those who extend the invitation to play. They receive attention, for example, albeit mostly negative attention. They avoid uncomfortable situations or prevent people having to accept responsibility.

One of the most fundamental dynamics of psychological games is described by Stephen Karpman as the Drama Triangle. Regardless of the topic of conversation, the parties occupy three roles: persecutor, rescuer, and victim. Using the concept of the Drama Triangle, it becomes possible to break the negative dynamics that arise through this persecutor-rescuer-victim relationship.

The concept of Drama Triangle can also be used with challenges in the area of development 'people'.

## Unconscious bias

Implicit biases are unconscious attitudes or stereotypes (Agarwal 2020; Burdick 2021). Although people are not aware of them, they drive their thoughts, emotions, choices, and behaviours. Even if they think they have a neutral attitude toward others and believe that objective criteria guide them, unconsciously, they might be driven by aversion or favouritism toward a person or group of people. Everyone has biases, and everyone is vulnerable to them. They are based on simplification and 'fast thinking' (Kahneman 2012) and can lead to exclusion.

Unconscious biases may conflict with conscious beliefs. E.g., because of someone's past experiences or education, they may think of themselves as promoting gender equity. At the same time, on an unconscious level, men may form an association with career and women with home. This may come from their upbringing or family models. It can push them into the trap of cognitive errors, simplifications during job interviews or promotions within their team. Being aware and educated about diversity and equality does not fully protect anyone fully from bias.

There are also important differences between explicit and implicit biases. Explicit biases are linked to an individual's conscious belief system. Implicit biases, by contrast, have become automatically engrained through associations formed over a lifetime. They result from observations, not choices. Based on the example mentioned above – it is enough for someone to have grown up in an environment of professionally inactive women and professionally active men to create an unconscious bias: 'career = male'. For inclusive leaders it is vital to uncover these dynamics in themselves and others. The concept of unconscious bias can also be used in the areas of development 'people', 'structure', and 'process'.

## Inclusive power and authority

Power is a driver and the agent of change and growth. It can be used to exclude when built on domination and subordination, but it can also be used to include, leading to greater collaboration and transformation. The social scientist and business consultant Mary Parker Follett (1868-1933) had already contributed to a differentiated concept of power by the start of the 20th century. In the following decades important insights arose on this topic, especially from the global South and from feminist research (including Hunjan/Keophilavong 2010; Just Associates 2006; VeneKlasen/Miller 2007).

The term 'power' is generally reduced to the contrast between 'exercising power over someone' and 'succumbing to power'. There are, however, more differentiated ways of reflecting on and using power that break the two-dimensional mindset of rulers and subjects. Power can be used in an inclusive way that engages the potential of all team members and unlocks strength and motivation for action, creation, and growth. This form of power has a positive impact on individuals, teams, and larger communities. It makes organisations vibrant, flexible, and dynamic.

INCLUDE distinguishes between four forms of power. Three of these four concepts of power involve the inclusive use of power and authority.

'Power over' describes the traditional approach of superiority and subordination outlined above. 'Power to' is based on the assumption that everyone has the power or potential to make a difference or to spark change. Leaders who follow this approach strive to create space for this potential to unfold. Exercising 'power with' one another takes place among equals. Power is shared, collaboration and relationships take centre stage. Here the leader ensures that all participants are included in dialogue and decision-making. The fourth form of power



is called 'power within'. This is about each individual's self-esteem and ability to act. 'Power within' is the basis for leaders developing the strength and courage to change their own environment.

The inclusive concept of power in INCLUDE can also be used with challenges in the areas of development 'people', 'structure', and 'process'.

## Area of development 2: 'People' – developing relationships

Leadership in terms of working with staff and colleagues in an organisation in the digital age means taking time to build relationships with the people who work with and for one.

Relationships need to be built and nurtured. INCLUDE leaders accept this challenge and are aware that they will spend a relevant part of their working time communicating with individuals or in teams. The basis of this relationship work is the willingness to value the contribution of each individual. It is about fostering diversity in an organisation as much as possible and recognising differences in e.g., personality, background, and experience as potentials for innovation. Inclusive leaders act with the mindset of accepting other approaches and consciously handing over responsibility (cf. School for Leaders Foundation/Alp/EU-Fundraising Association 2018).

### Area of development 'people'

At the core of this area of development is the question **of how someone wants to work together in the digital age with people with whom they are closely connected through their roles or responsibilities in their company or organisation.** The **central terms** in the internal relationship here are **trust and responsibility.** Trusting relationships develop when there is appreciative and transparent communication both bilaterally from person to person and within the team. This also includes a fear-free working environment with an appropriate culture of error tolerance that encourages

people to take their own initiatives. At the centre of a trusting cooperation is the appreciation of the person. In such an environment, it is forbidden for superiors to formally treat subordinates like „means of production“ that are moved from A to B depending on their benefit to the organisation. If leaders want to achieve something together with other people in their team, then they must act as much as possible „at eye level, relationship-oriented and uncomplicated“ among each other (Sassenrath 2017: 66).

INCLUDE leaders share **responsibility.** Shared responsibility, e.g., for the work results in a team, can arise when leaders both encourage and demand the assumption of responsibility. INCLUDE leaders follow the motto „doing things with people rather than to people“ (Hollander 2012: 9). In this way, they break through the classic division of roles between leaders and followers and allow the roles to change, e.g., depending on professional competence.

**Relationships** also play a decisive role in external relations, e.g., in personal contacts with customers or with suppliers and service providers. INCLUDE leaders therefore try to organise the work processes in an organisation in such a way that as many people as possible in an organisation have direct customer contact. Experiencing the positive results and the value of one's own work directly with the recipient of a service directly conveys meaning and makes people proud of what has been created. Critical feedback, on the other hand, provides a direct impulse for suggestions for improvement combined with the personal incentive to directly stimulate these improvements within the organisation. In addition, with frequent and direct customer contact, suggestions and ideas for new products and services are brought



to the organisation much more directly. The outside world, which is changing rapidly in the digital age, is given a better chance to influence the internal structures, processes, and offerings of an organisation. Both the ability to change and the speed of change of an organisation benefit from this in the long term.

If the foundations for more self-organisation, autonomous decisions, decentralised assumption of responsibility and trusting as well as cooperative collaboration are laid in the personal relationships among each other, then these INCLUDE characteristics can also have a positive effect on a larger scale in the structures and processes of an organisation. Any leader who does not start working on their INCLUDE relationships in the small things in their direct personal sphere of influence will find it difficult to be effective in the big things when it comes to structures and processes in the organisation.

INCLUDE behaviour must allow for honest feedback in both directions. In particular, hierarchical subordinates must have the confidence to give honest feedback to their

superiors. Those who manage to do away with superiors in the traditional sense and start experimenting with teams without explicit supervision, for example, might be surprised at the positive dynamics this creates (Sassenrath 2017: 66).

If trust and responsibility are to prevail in an organisation, then everyone involved should have an honest share in the common success. Although it may come as a surprise, the first step is to consistently abolish all personal bonus systems. Individual performance-related bonuses almost always create an incentive to disadvantage colleagues and customers for one's own benefit or even to take advantage of them. In sales, for example, this behaviour leads to selling customers inferior goods. In such an environment, which salesperson would be interested in passing on changing customer wishes internally? If the product sold no longer works, the salesperson can simply „hire on“ at the next company. A company that is forced out of the market by a new digital product, on the other hand, cannot „move on“ so easily. The digital transformation will therefore only



succeed if incentive systems are created in organisations that create „skin in the game“ (2018) for everyone as described by Nassim Nicholas Taleb. To achieve this, all participants must actually take responsibility for their decisions and their role. This will only work if they also have a measurable risk, thus „skin in the game“. It is worthwhile for INCLUDE leaders to work actively on such systems.

## Tools for practically implementing area of development 2 ‘people’

The following tools are particularly well suited to supporting leaders in their practical growth in the area ‘people’. In addition to this, each tool is suitable for one or more other areas of development. These additional applications will also be mentioned.

### Team Canvas

With Team Canvas leaders and team members can exchange information about their goals, motivations, and values, and talk about how these fit into an overall vision, for example for a project or an organisation. In the rush of daily operational tasks, it is easy to forget that in teamwork the things least talked about are what matter most. Team Canvas is a tool that facilitates structured conversations about crucial topics and the collation of these findings on a single piece of paper.

Team Canvas was designed by Alex Ivanov and Mitya Voloshchuk for teamwork. With this tool one will be able to see in a short time how their team understands the following important factors:

- Purpose
- Goals
- Values
- Rules and activities
- Roles and skills

Team Canvas makes it possible to align a vision and to see a team’s real needs and aspirations beyond what is formally written in the organisational structure. Work with Team Canvas reduces the potential for future conflicts and supports the decision-making abilities of a team in their work routines. Team Canvas is an excellent tool for both in-person and remote working. It is freely available under the terms of the Creative Commons Licence CC BY-SA 4.0. Team Canvas can also be used with challenges in the areas of development ‘structure’ and ‘process’.

## Tools for area of development ‘people’

### Fuckup Nights

The assumption behind Fuckup Nights, initiated by Brene Brown and Liv Larsson, is that people, groups, and organisations can learn from failure and can use it to support their development and further innovation. By properly working through failure, setbacks can become a springboard for future success and for lifelong learning and growth. Openness to failure encourages experimentation, which in turn prompts innovation. The best remedy for the shame of failure is to be open about it and to talk about it in front of others.

A ‘fuckup night’ is therefore:

1. An event where people from different industries and backgrounds share their failures in an emotionally safe way that builds bonds and creates a sense of closeness and acceptance of weakness. This represents a break from the culture of success, in which positive results are emphasised and often exaggerated, whilst failures are ignored or belittled.

2. A method for telling the story of one’s own failures in an entertaining way so that they inspire others and encourage learning.
3. A work and lifestyle manifesto, the implementation of which increases authenticity, flexibility, creativity and resilience.

The primary goal of the movement’s founders is to promote the creation of friendly work environments where people admit their mistakes and learn from them. Places where errors are not punished, and mistakes are not laughed at. Acceptance and the open admission of mistakes make people feel emotionally secure in the workplace and help them to support each other and strengthen their relationships. The result is an empathetic working environment. People can learn from their experiences, experiment more boldly (without fear of criticism or rejection), and are more willing to try new ways of doing things.

Fuckup Nights can also be used with challenges in the area of development ‘process’.

### Discounting

When working together with others, one will sometimes experience a co-worker getting stuck with a problem where one sees a clear solution oneself. Although these people can clearly convey their discontentment with the situation that they find themselves in, they do not end up taking any action to change the situation. Instead of acting, they end up discounting reality, ignoring facts and events, and disregarding aspects and possibilities that are completely clear and obvious to others. These people simply do not take a full and realistic look at the possibilities open to them. By failing to understand the bigger picture, they are unable to change their situation.

Discounting is a term taken from transactional analysis (see above). The concept stems from Ken Mellor and Eric Schiff. A person does not recognise feelings, thoughts, or actions – either in themselves or in others. They simply discount their existence. They may deny, for example, an event that has already taken place. This means that it is not possible for them to take steps to change the situation that they are stuck in.

It is important for a leader to recognise what level of discounting they are dealing with. This will enable them to take the appropriate measures to support an individual. When intervening, it is important that they are careful not to land in a so-called ‘Drama Triangle’ (cf. Tool ‘Drama Triangle’). Discounting can also be used with challenges in the area of development ‘leader’.

### Giving getting feedback

Giving and getting good feedback is an important foundation of teams who can act successfully. Implementing feedback correctly is, however, not as easy as most people think. For leaders it is one of the most important tools if they are to have an appreciative and effective impact.

The feedback model used in this tool is based on the Nonviolent Communication Model (NVC), developed by Marshall Rosenberg (see above and 2012; 2015). The basic prerequisite for non-violent communication is willingness. The aim of NVC is to shape people’s relationships with each other in such a way that they willingly contribute to each other’s well-being.

Feedback is a way to talk to others about things that are working or not working in the collaboration / relationship with them. By identifying and clarifying misunderstandings on an ongoing basis, their escalation into conflicts can be avoided. By talking about what works, good cooperation is



strengthened.

It is important to ensure that feedback is given with a positive and cooperative attitude. Anyone using feedback should bear in mind that an important purpose of a conversation with another person consists in being in touch with each other and understanding each other better.

Feedback can also be used with challenges in the area of development 'leader'.

### Leader as a coach

A leader who acts as a coach supports their colleagues – also called coachees – to achieve their goals by having thought-provoking and creative conversations. They set ambitious goals, unlock their potential, and expand their self-awareness, enabling them to strive for actions that up until that point seemed out of reach. The basic principle of this process is the autonomy and choice of the coachee. The leader's role as a coach is not to give advice. The leader directs his interventions to raise awareness of options and increase the coachee's sense of impact on reality.

Various coaching concepts that have been tested around the world were adapted for the INCLUDE tool leader as a coach (cf. amongst others Atkinson/Chois 2012; Hargrove 2008). Leaders can use these to make coaching a part of their inclusive culture of leadership without external support. The tips and working techniques described in this tool provide an answer to the question „How can inclusive leadership be implemented with coaching in practice?“.

The leader as a coach approach can also be used with challenges in the area of development 'leader'.

### Inclusive dialogue

Inclusive dialogue can happen when people enter a conversation with a willingness to rethink or change their beliefs, attitudes or ideas based on what the other person says. In an inclusive dialogue, people talk to each other and influence and inspire each other. This form of exchange is an essential tool of inclusive leadership since everyone's voice is heard and considered when working together.

Many leaders fear that their colleagues will not respond to pressing needs if they give their team full opportunity to express themselves, for example. However, an honest and open dialogue takes the perspectives of all participants into account.

The inclusive approach to dialogue in INCLUDE consists of several steps in a conversation that build on each other. These have been defined following Marchall B. Rosenberg (2015). When leaders take these steps into account, they will create a setting in which they listen to each other, at the same time consider the conditions that affect all participants in an organisation, and jointly search for a solution that benefits everyone involved.

Inclusive dialogue can also be used with challenges in the area of development 'leader'.

### Intercultural competences

Intercultural competence refers to the ability to work effectively with people from different cultural backgrounds. It sounds simple – as if it only means acquiring one more skill. But intercultural competence involves more than this. It means bringing together a set of attitudes, knowledge and social skills that enable one to go beyond the limiting filters of their own culture, so that encounters with other cultures is not seen as a threat but as an opportunity for

growth amongst people, the team, and the organisation.

Intercultural competence requires:

- a self-awareness of one's own cultural background understood as a set of shared values, accepted norms, beliefs and stereotypes and their impact on interactions with those perceived to be different.
- the attitude of cultural relativism when dealing with representatives of other cultures.
- the ability to apply knowledge about cultural differences to interactions with people.

Various concepts that have been internationally tested were adapted for the INCLUDE tool intercultural competence (cf. especially Bennett 1986; Hofstede/Hofstede/Minkov 2010; Molinsky 2013). This provides leaders and teams with a foundation to grow in a reflective way in this complex area.

Information from the intercultural competence topic can also be used with challenges in the area of development 'leader'.

### Area of development 3: 'Structure' – I, my team, and my organisation

Leadership with regard to the further development of the structure of an organisation in the digital age means questioning the existing structure and initiating changes where necessary. On the one hand, this concerns one's own role, e.g., with regard to a team or a department. On the other hand, it also means casting a critical eye on the structures of the entire organisation.

At the core of all aspects of structure in an organisation in the digital age is the question of **how people relate to each other in an organisation**. The central concept in the internal relationship is 'power', whereby the holders of this power can bring to bear firstly their **informal**

**social influence (informal structure)**, secondly their **reputation as a performer (structure of performance)** and thirdly their **formal position in the hierarchy (formal structure)** in order to effect change within the organisational structure as leaders. According to Silke Hermann and Niels Pfläging (2020), these **three areas of power or influence** exist within the structures of every organisation. Power or influence is neither positive nor negative. It is a fact that people have influence on other people. The only relevant question is therefore how and for what they use this influence or power.

### Area of development 'structure'

From this perspective, leadership always has a normative dimension. Leaders can use their position in the hierarchy for personal gain or abuse it to the detriment of their subordinates and colleagues instead of using their influence in the interest of the organisation. A central question for leaders in this context is to what extent they can organise the structures of an organisation in such a way that there is an incentive to use personal influence within the organisation in such a way that it becomes effective in terms of the organisational goals. Acting 'politically' in one's own interest or in the interests of one's department, for example, is a common trait of 'formal' authorities and usually damages the organisation as a whole. The result is departmental thinking or a silo mentality that is by no means only present in larger enterprises or organisations.

For INCLUDE leaders, it is therefore important to consistently tear down existing 'walls' or at least make them more permeable as a first step. On the one hand, this applies within the organisation, for example as they create more transparency so that knowledge is not 'hoarded' in individual organisational units. On the other hand, organisations should also open up much more externally, so that they, for example, develop their relationships with their suppliers along their value chain from a pure



client-contractor relationship more in the direction of partnership. The **central term** from the perspective of an INCLUDE leader in **external relations** is therefore **'partnering'** (cf. Sassenrath 2017: 26).

It is no surprise that most ideas and proposals for developing an organisation focus on the 'formal' structure or on the 'formally' defined roles and responsibilities. Most people almost reflexively think of the structure of an organisation only in terms of this 'formal' structure, i.e., existing hierarchies or the relationships between different departments. In the mind's eye, the image of an organigram arises almost automatically. This is understandable, but not sufficient if someone wants to make a difference structurally as a leader in the digital age.

Only those who, as inclusive leaders in the digital age, know the 'formal', the 'informal' as well as the 'structure of performance' and precisely analyse the constellations of power or influence that go along with them, are in a position to successfully exert influence in the structural area. Leaders should always think in advance about how possible interventions in their organisation's system will affect all three structures and what reactions can be expected. For example, they should consider which power holders they need as supporters in order to achieve a desired goal more easily with an intervention.

### Tools for practically implementing area of development 3 'structure'

The following tools are particularly well suited to supporting leaders in their practical growth in the area 'structure'. In addition to this, each tool is suitable for one or more other areas of development. These additional applications will also be mentioned.

### BetaCodex

The BetaCodex concept (see above) is less a tool than an attitude or a mindset. Beta can become a decisive instrument in processes of change and when quickly restructuring an organisational structure because the Beta principles work like a compass. The BetaCodex consists of 12 principles that can be used to make it easier to arrive at decisions in complex situations. Beta is like a new language that all those involved in the practical work can pick up so that they can all act in unison in the future. The Beta principles allow a new organisational image to emerge that, amongst other things, emphasises shared responsibility rather than top-down instructions from the management team.

The BetaCodex is based on principles and not on rules. That is the decisive difference. Strict rules stipulate exactly what must be done. This may be an advantage in easy decision-making situations or in recurrent processes. However, as soon as a new challenge, such as digital transformation, arises for the leaders or for the entire organisation, then the 'rules' of bygone times are no longer of any help. They will usually even block the new start that is so desperately needed. The Beta principles, by contrast, can adapt to every new situation. They provide support and, at the same time, leave all the leeway that is required to react appropriately to a new situation. Beta is not a hammer that only needs to hit straight into the wood for everything to work out well. Beta is a new way for organisations to think and act, and thereby to make the best out of their individual potential.

BetaCodex is supported and developed internationally by the BetaCodex network. The BetaCodex approach used in INCLUDE has been inspired by the Open Space Beta concept from Silke Hermann and Niels Pfläging (see above; 2020). Open Space Beta is freely available under the terms of the

### Tools for area of development 'structure'

Creative Commons licence CC-BY-SA-4.0. BetaCodex can also be used with challenges in the areas of development 'people', 'process', and 'technology'.

### Cell Structure Design

Cell Structure Design changes the perspective for the way organisations are thought about and portrayed. Instead of a 'top' and a 'bottom' with departments and sub-departments like in a traditional pyramid structure, cell structure design organises organisations and companies from 'outside' to 'inside'. The main driving forces for cell structure design are the external market and the needs that visibly emerge in this market. The central components of this organisational concept are autonomous cells that review their own achievements and present these achievements to all stakeholders.

Cell Structure Design has a positive impact because the needs of customers and target groups, as well as market developments, are placed at the centre. Those cells that work directly with customers drive the entire organisation. Traditional decision-makers also remain important in cell structure design, but the organisation's main activities are organised systematically so that requirements of the market or of the target groups is at the core of all decisions.

The basic idea behind cell structure design is that an organisation's added value always comes at the point where customers are prepared to pay an invoice for it. For non-profit organisations we can find an equivalent to the paying customer in the distinct target group that makes use of what the organisation has to offer. Cell Structure

Design achieves its full effect when productive work is being done for customers or target groups.

Cell Structure Design, which is founded on the principles of the BetaCodex (see above), is a shortcut primarily for small and medium-sized organisations to adjust structurally and systematically to the changes that digital transformation demands of everyone.

Cell Structure Design is a concept from Silke Hermann and Niels Pfläging (see above; 2020), that is freely available under the terms of the Creative Commons licence CC-BY-SA-4.0.

Cell Structure Design can also be used with challenges in the areas of development 'leader', 'people', 'process', and 'technology'.

### Open Space for Organisations

Open Space (see above) is really just a synonym for self-organisation. This event format allows one to achieve a high level of engagement for a particular topic. This is possible because an Open Space conference is only attended by people who consider the event's topic to be important. In addition to this, all of the participants are told that they are themselves responsible for learning and contributing something useful during the course of the Open Space conference. All of the participants know that it depends on them to make the Open Space event a success. The result of this is the Open Space conferences proceed more productively and with a great focus on action than traditional event formats.

Open Space is particularly well suited to complex situations, for example when a new concept of leadership, a new organisational structure, a new strategy, or a new product needs to be developed, or when different steps for implementing a new strategy need to be determined, coordinated, and set into



motion for this.

Open Space was 'discovered' by Harrison Owen (2012). The procedure is freely available and has been successfully implemented across the world for decades. When using Open Space, it is important not to 'corrupt' the tool. The foundational philosophy of willingness etc., for example, cannot be called into question.

This restriction at this point contradicts the basic request of the INCLUDE approach to its users, namely to adapt all the tools presented to their own situations within their organisations. This recommendation does not apply to the Open Space approach. In fact, many so-called Open Space events take place that do not deserve the name. If Open Space is not used properly, it can lead to frustration for all participants and do more harm than good. Harrison Owen's classic Open Space concept plays an important role in the INCLUDE process model as presented step-by-step in the next section.

Open Space for Organisations can also be used with challenges in the areas of development 'leader', 'people', 'process', and 'technology'. There is also an adaptation of the Open Space concept for individual leaders and leadership teams in the area of development 'leader' (see above).

## Golden Circle

The Golden Circle is a method that helps one define an organisation's mission, vision, and competitive advantage. Organisations that communicate according to the rules of the Golden Circle will attract talented people who want to commit to making their vision a reality. These organisations will also create a loyal customer community that share their values. With this method, they will be able to inspire and engage people without resorting to manipulation. The Golden Circle model suggests three

steps for effective argumentation. Whether someone wants to open a new business, increase market share or convince a team to make an organisational change or engage in recent activity – they should always start by answering 'why'. They can then indicate 'how' to achieve it and, at the end of the message, point out 'what' the solution (for example a product or a service) is exactly.

This method is effective both for communicating externally and internally within an organisation. It can be used for changes on a large scale or in ordinary situations.

The core message of the Golden Circle approach, that stems from Simon Sinek (2011), is that in a rapidly changing, unpredictable world, the key is to ask 'why' we do what we do. The ways and solutions ('how' and 'what') can change.

Golden Circle can also be used with challenges in the areas of development 'people' and 'process'.

## Area of development 4: 'Process' – living a shared vision and creating change

Leadership with regard to the further development of an organisation's processes in the digital age means developing work and decision-making processes in such a way that all members of an organisation want to achieve a common vision and support or, at best, initiate necessary changes in this direction.

Filling a shared vision with life means being open and inviting real participation, for example in a change process. This means relying on everyone's participation from the development of a common vision for the future of an organisation to the implementation of this vision and motivating everyone to make an individual contribution. „Co-visionaries“ can be inspired at all levels of the hierarchy and become active co-creators (cf. School for Leaders Foundation/Alp/EU-Fundraising Association 2018).

Bringing about change and daring to try something new are central components of leadership. Change processes become inclusive when as many actors as possible are involved, both internally and externally, for example, when they consciously go beyond the boundaries of the organisation. Bringing about change together promotes a sense of belonging for all those involved (cf. School for Leaders Foundation/Alp/EU-Fundraising Association 2018).

At the core of all aspects of process improvement in an organisation in the digital age is the following question: **Who does or decides what, when, how, with what, for whom and above all why?** The **central terms in the internal relationship are self-organisation and agility.** **Self-organisation** means consistently orienting all processes towards the autonomy of individuals and teams, decentralised decisions, shared responsibilities, and the broad participation of all. **Agility**, understood as the ability of an organisation to adapt to a rapidly changing environment, is the central prerequisite for success in the digital age (Sassenrath 2017:

29). Core characteristics of processes in agile organisations are an increased speed, e.g., in the implementation of innovations, a trial-and-error mentality instead of a planned economy and implementation of targets, a step-by-step approach that allows for mistakes and values them positively as a learning experience, as well as the willingness of all participants to take calculated higher risks. If these self-organised and agile work and decision-making processes are consistently aligned with the values of an organisation, the vision, and the long-term goals, then the transformation in the digital age can succeed.

## Area of development 'process'

The **central concept in external relations** is the **customer or target group for whom a product or service is provided.** Customers or target groups are those who actually pay for a product or service or who benefit from a it. Organisations that want to survive in the digital age must consistently align their processes with the benefits for their customers or target groups. This is not primarily about improving processes for already existing products. The much more important question is: What is the most important problem that our customers currently have and that we could solve (Rodgers 2016: 7)? Leaders who ask this question automatically align their processes with new solutions and the products of the future.

When it comes to processes, organisations that have formally defined processes, e.g., as part of an ISO 9001 certified quality management system, run the risk of focusing too much on these processes. This is a mistake. Often, it is precisely these processes that lead to internal organisational rigidities and resistance along the lines of „these are our standards and we have always done this“. As a leader in the digital age, one can try to set the first impulses in the process area first in those areas where formal processes are affected as little as possible.

The goal should be to develop an organisation



step by step from a departmental organisation to a process organisation (Sassenrath 2017: 85). Smart, customer-focused processes with as much self-organisation and agility as possible are more important in the digital age than individual results, e.g., meeting a cost or turnover target. The best thing to do is to abolish rigid rules, specifications, reporting obligations and results targets as far as possible. Then everyone involved can concentrate on actually living the shared vision and looking for what is really needed in the future. For the digital age, it is truer than ever: one cannot plan the new, one can only discover it (Sassenrath 2017: 15). Smart work and decision-making processes are the key to making as many discoveries as possible in the digital age. The more the better. It then becomes more and more likely to find a treasure every now and then.

## Tools for practically implementing area of development 4 ‘process’

The following tools are particularly well suited to supporting leaders in their practical growth in the area ‘process’. In addition to this, each tool is suitable for one or more other areas of development. These additional applications will also be mentioned.

### Scrum

Scrum is currently the most well-known project management method. The method was developed by Ken Schwaber and Jeff Sutherland for agile software development in particular (2020; Sutherland 2015), but is now being used in many other sectors outside of software development. The name originally comes from the sport of rugby. Scrum is an abbreviated form of ‘scrummage’ and refers to a moment in the game where the players come close together. This situation is all about agility, dynamism, and communication. This is what Scrum stands for. The foundational principles that take

centre stage in Scrum are:

- iterative, incremental action, where useful increments are developed as quickly as possible rather than completing and presenting the final result at a much later date.
- consistent orientation around customers, rather than ensuring that the original plan is implemented as exactly as possible.
- self-organisation instead of central (project) governance.

These three aspects are pertinent for INCLUDE. Scrum makes it possible to succeed in a volatile and uncertain business environment where the expectations of customers and target groups are changing and creativity is required. Scrum creates a working structure based on understanding, self-organisation, the improvement of quality and pace of work, and learning from experience. Applying this method will enable a team to respond flexibly to new expectations and circumstances. Scrum is one possible answer to the challenges associated with technological acceleration, the constant search for innovation, and a rapid rate of work with the pressure to perform.

Scrum can be implemented anywhere where the aim is to increase productivity and achieve better results so that suitable solutions can be developed in close consultation with customers or target groups. The method offers a good starting point for systematically increasing the agility of a team or organisation. In the context of INCLUDE, ‘agility’ means understanding the ability of an organisation to respond appropriately and flexibly to changing parameters.

Scrum can also be used with challenges in the areas of development ‘structure’ and ‘technology’.

## Tools for the area of development ‘process’

### Consent Decision-Making

The consent method is a central element in sociocracy (see above). It is particularly well suited to making important decisions together as a team. If a decision-making situation is confusing or complex, for example when it comes to questions regarding an organisation’s digital transformation, then the consent method is a good choice.

In general, no single person in a group is capable of completely surveying all information and decision-making possibilities when it comes to fundamental decisions. With consent decision-making, they can use the intelligence of the entire group without falling into endless and fruitless discussions. Consent is more democratic than democracy, where individuals find their differing opinions to be outvoted by the majority. Consent decision-making, by contrast, uses precisely these individual objections to reach a suitable solution collectively. The structured approach of consent decision-making ensures that the decision does not come to a standstill.

Specifically, consent means: ‘I do not have any substantial objection to the current proposal in light of our common goal.’ One therefore does not have to vote for a draft proposal with 100% conviction in a Consent Decision-Making process, but they can still agree that it be implemented. This gives more room for manoeuvring and opens options that go beyond the ‘lowest common denominator’.

In the consent procedure, a ‘substantial objection’ is not the same as a veto. Anyone who raises such an objection must substantiate it with factual arguments. ‘Substantial objections’ are treated in such a way in consent procedure that the one raising the

objection, or the entire group, is responsible for finding a solution that satisfies the ‘substantial objection’. In effect, this means: ‘We may have overlooked something important and must potentially integrate this argument in our solution.’

Consent Decision-Making can also be used with challenges in the area of development ‘structure’.

### Consultative Individual Decision

Consultative individual decision-making is a suitable method for making decisions in organisations that want to decide participatorily, effectively, and quickly. The method, which stems from the German business consultant Niels Pfläging (cf. Gloger 2017; Roock 2014; Simanek 2021), connects the expertise and ability of the individual with the know-how of the group. One person is responsible for deciding, but they are required to involve other people from the organisation and, where necessary, external experts. The objections, questions, suggestions, pointers, ideas etc., of the people involved must be listened to and considered.

Consultative individual decision-making has many advantages when compared with traditional ways of making decisions. Responsibility for the decision is handed over to an individual from the group with their agreement. This is someone who has a significant interest in the decision and would also be strongly affected by or would benefit from its consequences. The person making the decision is given key conditions for their next steps and those affected by the decision can be sure that their opinion will be listened to. This leads to increased acceptance for the binding decision that will come later. A consultative individual decision also prevents the decision-maker being blinded by their expertise, since



various people must be involved in the process. The diversity of the positions involved, and their ideas lead to better solutions. With this method, responsibility for important and for daily decisions can be constantly changing within an organisation. The group is always commissioning different people who are best suited based on their expertise. In the best case, this means that everyone regularly assumes responsibility for decisions. This is efficient and effective self-organisation par excellence. Consultative Individual Decisions can also be used with challenges in the area of development 'structure'.

### Team Contract

All teams work according to rules that determine the way they work together. Even if these are not explicitly expressed, they are still present and are viewed by some team members as more or less binding. Failing to have an open discussion about shared rules will lead to every team member being led primarily by their own convictions. The result is typically a mishmash of different standards of behaviour that often only come to light when conflict arises. If clearly defined, collaboratively formulated rules are lacking, it can lead in any team to friction losses and exacerbated conflicts. These can be avoided as far as possible by creating a team contract (cf. Mastrogiamomo/ Osterwalder 2021).

A team contract clearly regulates the desired way of working together and lays down transparent targets for all team members. This makes it clear what is wanted and what is not wanted. Amongst other things, the contract affects daily work together and makes it easier to give feedback to each other through a written record of rules, guidelines, and ways of behaving. It becomes easier to solve conflicts or, in a best-case scenario, they do not even

emerge in the first place. The team contract is an important instrument for creating emotional security in a team. All team members know which ways of behaving are expected and which are not. The team contract makes it possible for inclusive leaders to establish shared rules that all those involved take responsibility for. This lends a greater binding force to the rules and motivates all those involved to personally assume responsibility for keeping the contract. A Team Contract can also be used with challenges in the areas of development 'leader' and 'people'.

### Delegation Board

Misunderstandings and conflicts often arise between leaders and team members because it has not been defined clearly enough the extent to which the freedom to make decisions, the provision of stipulations, or mutual coordination is present or required in different situations.

If a leader wants their team to accept more responsibility, they need to delegate responsibility for decisions and achieving goals in a way that everyone can understand. Team members will then make decisions within the parameters that have been previously decided upon and are allowed to make their own mistakes.

Delegation does not all or nothing, in other words either everything is supervised, or it is completely delegated. Delegation can take place in a differentiated way with the delegation board. By choosing a level of delegation that fits the people and the situation one can increase the team's involvement, foster their growth, and free up their resources – both for themselves as a leader and for the team members.

With the delegation board, popularised by Jurgen Appelo (2010) in his 3.0 management approach, one can visualise the

delegation of tasks in a way that everyone can understand. There is differentiation between seven levels of delegation. These stretch from direct instructions through to the highest level of handing over control, where a leader is no longer involved at all. The nearer a team gets to this seventh level, the further they are on their journey towards becoming a truly self-organised team. The Delegation Board can also be used with challenges in the areas of development 'leader', 'people', and 'structure'.

### Peer Consultation

Peer Consultation is a form of support in which one colleague discusses a current challenge or problem with one or more other colleagues. This method, for which there are various approaches in academic literature (cf. Bowman 2008; Department of Education 2019), fosters positive change within the team by sharing experiences and working together to find solutions. This support method unlocks resources and creates a sense of empowerment within the team.

During peer consultation, one person presents a current challenge. Colleagues ask in-depth questions, give feedback, and share their experiences and opinions. The colleague's task is not to suggest solutions, but to be guided by the question: „What would I do if I were in that situation?“

The person who presented the challenge chooses the best option for themselves. They can follow what they have heard or develop a new idea inspired by the team. This approach is enriching for everyone involved, as everyone is inspired by what they hear and their sense of individual responsibility and ability to solve problems are strengthened.

Peer Consultation can also be used with

challenges in the areas of development 'leader' and 'people'.



## Area of development 5: 'Technology' - dealing with the driving forces that change the world

Inclusive leadership at the start of the 21st century can only work if one as a leader deals with the new technologies that make a lasting impact on our society and world of work. The 'digital age' is one of the most important factors affecting leadership today and in the future. This is why leaders should make it their goal to embed the discussion and use of new technological developments in their organisation's DNA.

The new technologies and the resultant digital transformation of our society mean that every organisation should internally and critically re-examine their current **business model**. Another challenge is dealing with and integrating **new digital forms of work** such as remote work in every organisation's structures and processes.

### Area of development 'technology'

The concept of a business model is, among other things, all about building an organisation that is more robust in the future so that it can react more confidently to rapid change and even to unexpected negative or positive external events. For organisations working in areas that have been radically transformed by new technological developments it is not enough, however, to only undertake basic changes to their business model. Many people will have to rethink their organisation and the way that it organises its services to its customers or target groups from the ground up. This is the reason why it is crucially important for leaders to know or learn how they and their teams or employees can develop and implement a new (more digital) business model. Looking outwards, the key terms in this area of development are **dealing with complexity**

and **risk and opportunity expertise**. These factors are just as relevant for leaders as for all employees. It should be important to leaders that they themselves and all those around them are constantly developing these skills. This is the only way for them to be equipped for the challenges that will face them, on the one hand, and to better assess and use the opportunities that are open to them and their organisations, on the other hand. The latter is far more significant when it comes to dealing with new technologies.

All important aspects that effect the area of development 'technology' are directed towards the future. No one can know, however, what exactly this future will entail for their organisation. Leaders and their teams in the digital age should therefore care about learning how to make better decisions about the future despite all the current uncertainties. A heightened ability to predict the future can, amongst other things, be combined with the use of suitable heuristics, for example, to help make better decisions about the future and at the same time make a lasting improvement on an organisation's resilience (see above).

Leaders and teams that enjoy rediscovering themselves have a clear advantage when it comes to dealing with new (digital) technologies. We are living in an age of 'creative destruction' (Schumpeter), and those with responsibility can decide together with their team whether they would like to stand on the side that proactively contributes to these changes or rather waits until the waves around them have grown so high that they threaten to sink their organisation's boat.

## Tools for practically implementing area of development 5 'technology'

The following tools are particularly well suited to supporting leaders in their practical growth in the area 'technology'. In addition to this, each tool is suitable for one or more other areas of development. These additional applications will also be mentioned.

### Remote Work

The Remote Work tool from INCLUDE picks up on central aspects and challenges that have arisen through this different form of work in the digital age (cf. Cappelli 2021; Dhawan 2021; Dyer/Shepherd 2021; Harvard Business Review 2021; Neeley 2021).

In order to function properly, every team needs a vision, a goal, clear communication, a clear structure, clear roles, established rules of cooperation and a sense of belonging. Remote teams are the same as in-person teams. In virtual, geographically dispersed teams, it is impossible to meet these needs with the same tools that work well in groups who are physically working together.

Working remotely allows teams to work together and achieve their goals, even when the members are in different geographical locations or even in different time zones. This allows a team to include talented individuals from all over the world. One can maintain business continuity in situations such as a pandemic and reduce the cost of running the business. Remote work requires a different approach to organising people, nurturing motivation, and creating a team spirit than work done in a shared physical space. This applies specifically to:

- choosing a common work platform that promotes collaboration and productivity;
- organising work (availability, working

hours, division of roles);

- establishing rules for communication (in groups and one-on-one);
- leading the team in the virtual world, including development, motivation, and integration;
- being sensitive to the difficulties generated by the digital world, including the danger of exclusion and the risks to the mental health of team members as a result of isolation.

Remote Work can also be used with challenges in the areas of development 'leader', 'people', 'structure', and 'process'.

### Tools for area of development 'technology'

### How to conduct online meetings

For online meetings to run successfully and in a focussed way, it relies on the one hand on good preparation. On the other hand, it is possible to get a lot of things right when carrying them out, but also do things wrong (cf. for example Tippin/Kalbach/Chin 2018).

When running an online meeting one needs to consider how technology affects the behaviour and attitudes of participants. Although many processes are similar in online events, they have different dynamics than offline ones. For example, people get bored and frustrated faster compared to face-to-face sessions. Technology can lead to unconscious exclusions of parts of the team. On the other hand, this formula can speed up the flow of information and decision-making processes.

The INCLUDE instructions for how to conduct online meetings can also be used with challenges in the areas of development 'people' and 'process'.



## Digital transformation tool

The digital transformation tool is not a single tool. It is more of a 'tool of tools'. Various well-known and effective methods and instruments are combined in such a way in the digital transformation tool that digital transformation, whilst not being easy, can be successfully carried out by any organisation to a large extent independently and without external consultation.

It is important that organisations are equipped to set up the necessary strategic and operational course-setting in the direction of digital transformation and to initiate its implementation in their ongoing business processes.

Every organisation needs decision-makers and employees that have a deep-seated understanding for the potential of digital technologies and applications, and who can facilitate the necessary process of change in their organisation. It is with this end in mind that the digital transformation tool offers a self-learning tool that all those involved to use directly at their places of work.

The working, learning, and planning materials that are provided by the digital transformation tool will help people to understand the opportunities and risks of digital transformation. By developing and implementing an individual digital strategy for transformation, an organisation's competitiveness can be sustainably increased.

The key elements of the digital transformation tool build on one another. A quick check will give a first impression of where an organisation is currently at. Building on this, short modules will help people to get to grips with the most important technological developments, for example big data, blockchain or artificial intelligence (AI). The tool will then take users through their individual process of digital transformation with step-by-step instructions. With the prioritisation tool at the end, people have an instrument at their disposal that will help them to

decide what should be done first.

The digital transformation tool is the product of the EU-funded project 'Digitalisation' (2017-2019), which was jointly developed by seven organisations from five countries. Various INCLUDE project partners were already involved in this project. The lead partner responsible for the project was emcra - Co-shaping Europe from Berlin. emcra also initiated the INCLUDE project.

The digital transformation tool is accessible online. The tool's resources are subject to the Creative Commons licence CC-BY-SA 4.0 and are available free of charge. A theoretical concept created by LUISS Guido Carli University together with the project partners is available for a more in-depth study of the topic of digital transformation (2019).

The digital transformation tool can also be used with challenges in the areas of development 'structure' and 'process'.

The five areas of development introduced here each represent a significant challenge for all inclusive leaders and for anyone who wants to become one. INCLUDE leaders should make an effort to grow in all five areas. To make this process easier, a process model was designed on the basis of earlier findings. This contains step-by-step instructions that will explain to leaders practically how they can shape both their own and their organisation's process of development in such a way that gradual but also quick development becomes possible – alongside their daily work.



# 06

## The INCLUDE Process Model Step-by-Step





## INCLUDE Step-by-Step – How does it work? The integration of theories, methods and tools // A graphical visualisation of the INCLUDE process model

The INCLUDE process model is aimed at SME, SMO, start-ups, and providers of vocational education. The leaders and employees in these organisations and companies will receive support from the INCLUDE approach to help them introduce both themselves and their organisations to the challenges of the digital age and to address these challenges collaboratively and successfully.

It is true of all of INCLUDE's target group: they need support that is as close as possible to the reality in the workplace. The best approaches are those that they can put into practice directly on the job. The INCLUDE process model aims, where possible, for the implementation to be tested with the help of tangible, practical challenges in the organisation. The learning, testing, and practising involved in

using INCLUDE will ideally lead to results that the organisation already urgently needed.

### 6.1 INCLUDE Step-by-Step – How does it work? The integration of theories, methods and tools

'Step-by-step' should be taken literally with INCLUDE. There is no patented recipe or standard script for change that an organisation can simply walk through to automatically develop a new leadership culture that meets the challenges of the digital age.

Every organisation and company has to 'write' its specific and unique script for change by

itself. The INCLUDE process model delivers a step-by-step set of instructions for those who want to set out on this journey. INCLUDE offers a structured, incremental process, in which an organisation can find out what works by trial and error or by practising and testing. Anything that doesn't work, on the other hand, can be quickly set to one side.

### 'It's safe enough to try' and 'Good enough for now'

The guiding principles upon which the INCLUDE process model is founded have their origins in sociocracy and are: 'it's safe enough to try' and 'good enough for now' (Rüther 2018). Whilst carrying out the implementation of the INCLUDE process model, it is important to frequently consider whether there are substantial objections to a new approach or a particular idea. Substantial objections are present whenever it could put the goal of the process of change or even the entire organisation in danger. If this is not the case, then it can be tried out.

### 'It's safe enough to try' and 'good enough for now'

No idea or suggestion needs to already be perfect for this. It is much more important that an idea or suggestion is 'good enough' to be tried out. It is not necessary to provide an exact definition of what constitutes a 'substantial objection' or what is 'good enough'. Those involved are usually able to make a clear decision on the basis of their previous experiences.

### Tools and methods for the five areas of development

INCLUDE places a broad set of tools and methods for the five most important areas of development on the journey towards inclusive leadership in the digital age at the disposal of every organisation and company. These five

areas are:

- 'leader' – tools for self-reflection and self-awareness;
- 'people' – tools for developing relationships;
- 'structure' – tools for me, my team, and my organisation;
- 'process' – tools for living a shared vision and creating change and
- 'technology' – tools for the driving forces that change the world.

### Tools and methods for the five areas of development

Every leader or organisation must make the choice themselves between these different tools and methods during their step-by-step process. The methods and tools they choose should fit the organisation and, if necessary, be adapted or further developed so that they work in the context of the organisation. When doing this, it is important to remember that there is no such thing as a best practice tool or a best method. There are only tools that have already worked well in other organisations faced with different parameters. This means that no tool or method should be simply transferred 1 to 1 (cf. Sassenrath 2017: 76f.).

### The limits of INCLUDE

It will be clear to good leaders that traditionally developed, hierarchical organisations, for example, cannot be transformed overnight into holacracies. There are simply too many interim stages and a long process of development required for this. Beyond this, even with all of the advantages that, for example, the trend towards increased self-organisation offers, clear decision-making structures and responsibilities in distinct sectors or jobs do not become any less valid. Who would like to be sitting in an airplane where there is a lengthy discussion with the passengers about the best course of action in the event of a sudden loss of cabin pressure? However, with this aircraft example,

the benefits of the INCLUDE approach can once again be well demonstrated. It might come as a surprise, but it is actually the case that the pilot should not be the only one to make decisions when there is a problem in the cockpit. It has been shown to be very advantageous to incorporate information and opinions from the rest of the flight crew in the decision-making process whenever possible (Gigerenzer 2020). Even in such an example the inclusive way leads to better decisions – to such an extent that lives are thereby saved.

### The limits of INCLUDE

It is all about establishing an appropriate mix of instruments for leadership and decision-making, with which hierarchical structures and self-organisation can be combined in an organisation. Both can and will exist together in every organisation. However, with the INCLUDE approach, one has the chance to give more weight to the forces of self-organisation.

### Two phases

The INCLUDE process model consists in two phases, each of which are subdivided into numerous consecutive steps. The first phase deals with leaders themselves. This phase is all about self-reflection, conducted primarily without the involvement of third parties. Future inclusive leaders need to begin first of all with themselves in order to then be in a better position to accompany their organisation on the INCLUDE process of change.

### Two phases

The entire organisation is involved in the second phase. This phase is all about winning as many employees and stakeholders as possible over to the collaborative process of developing the organisation. Together with these employees and stakeholders, new forms of

collaboration, decision-making and responsibility etc. are learned, tested, put into practice in everyday working situations and, if appropriate, established as new courses of action in the organisation.

In both of these phases one should begin with the tools and methods that will provoke as little opposition as possible. There are almost always suggestions or ideas that do not immediately lead to frowning faces or doubts amongst those being addressed. Some ideas will even find immediate support, for example the suggestion that all regular appointments and meetings should be re-examined. It is not necessary to call for the abolition of all meetings. It is enough to assess their length, regularity, aims and content, as well as the form of communication (cf. Sassenrath 2017: 77f.).

### Processes of change take time

A word about the time required for this: the first phase of self-assessment can be carried out in around three months. This is the length of time that leaders should set aside if, on the one hand, they are to get to know themselves better and, on the other hand, they are to be well prepared when they start the second phase. Around six months should be set aside for the second phase. At the end of this time there is a review and assessment of the progress that has been made.

### Processes of change take time

Changes in complex systems such as organisations or companies typically take longer than nine months, in reality often several years (Sassenrath 2017: 79). The INCLUDE process model has therefore been designed in a way that it can be a permanent companion to the ongoing development of the organisation. None of this can happen, however, without the first brave step of those in leadership who want to develop themselves further into inclusive leaders.

## 6.2 A graphical visualisation of the INCLUDE process model

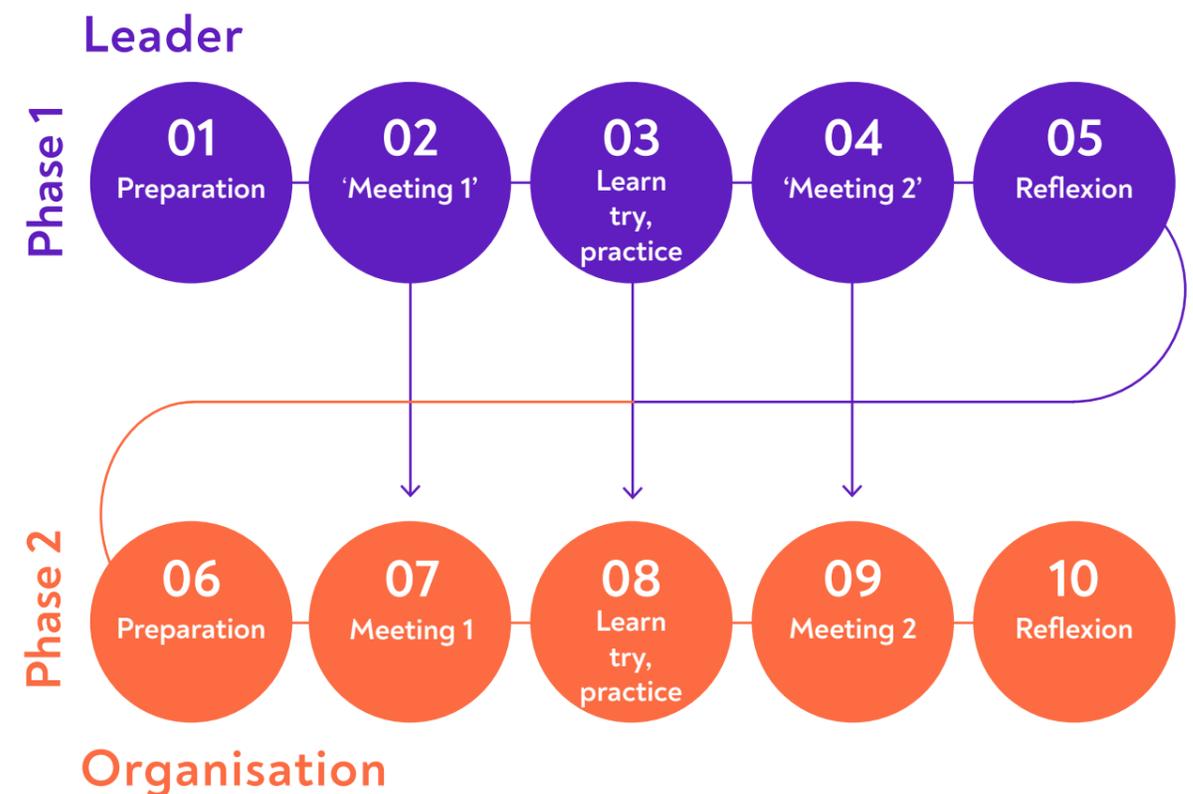


Figure 5: The INCLUDE process model

### The INCLUDE process model explained step-by-step

The graphical visualisation above shows an overview of how the INCLUDE process will unfold. The individual steps are each briefly explained below (cf. in relation to this especially Hermann/Pfläging 2020).

#### 1st Phase: Self-reflection (around 90 days)

The INCLUDE process starts with those leaders who carry responsibility, for example CEOs or governors. Those in leadership who want to develop themselves to inclusive leaders in the digital age start the process by first taking the time to seriously examine themselves, their

patterns or thinking and behaviour, and the planned process of change.

### The INCLUDE process model explained step-by-step

#### 1.1 'Invitation to myself' – Preparation (around 30 days)

This first step creates the foundational willingness to actively confront one's own role and (previous) behaviour as a leader. In this step, leaders will analyse their personal situation and that of their organisation. To help them with

this they can use, for example, the learning resources and information at their disposal in the INCLUDE handbook<sup>3</sup> or in the INCLUDE email course<sup>4</sup> on the topic of inclusive leadership in the digital age.

## 1st Phase: Self-reflection

In this first step in phase 1 leaders will write an 'invitation to myself', in which they will outline as precisely as possible why they want to make this journey towards being an inclusive leader. Furthermore, they are committing to reserving enough time for this process and creating a working environment that is as undisturbed and comfortable as possible. This 'invitation to myself' will specify one or two specific days, on which 'meeting with myself' I will take place. It is recommended that this invitation actually be sent to one's own e-mail address, for example as an email marked particularly urgent. This increases the sense of obligation and gives the whole process a fitting sense of importance. This is, after all, the start of a process of development that will change the entire organisation.

### 1.2. 'Meeting with myself' I (1 to 2 days)

'Meeting with myself' I is the second step in phase one and offers the opportunity to spend one or two days thoroughly engaging with one's own ideas, experiences, perspectives etc. with reference to the role as leader in one's own organisation – stepping beyond the daily challenges of the business. This 'meeting' adapts the advantages of open space technology to give leaders absolute freedom to engage only

<sup>3</sup> The publication 'INCLUDE – Inclusive Leadership in the Digital Age. Handbook for Leaders and Everyone who Wants to Become One' is available free of charge for download here: [http://link.emcra.eu/INCLUDE\\_Manuals](http://link.emcra.eu/INCLUDE_Manuals).

<sup>4</sup> The email course, which facilitates a low threshold entry to the topic, can be signed up for free of charge here: [http://link.emcra.eu/INCLUDE\\_EmailCourse](http://link.emcra.eu/INCLUDE_EmailCourse).

with topics and aspects of their own behaviour that are most interesting at this point in time. By the end of this time, the leader will have developed a detailed plan of action for themselves with different priorities that can be addressed in more detail in the following phase (see 'Open Space for Leaders' tool above).

### 1.3 Learning, trying, and practicing (around 45 days)

In this 3rd step in phase 1, the leader will immerse themselves further in the topic, learning new tools and methods, trying these out and putting them into practice. This will initially take place without the involvement of any third parties, for example the leader can use the tools and methods in the INCLUDE handbook that are recommended specifically for the 'leader' area of development. It is important to be open to new methods. It is possible to be surprised, and this can lead to exciting new insights about oneself. In this phase nothing can go wrong and as long as no third party is involved, the whole self-exploration process is 100 per cent „private“.

It is, however, possible to test the first tools and methods with third parties in this phase. This could be with external contacts, or with individuals or teams from within the organisation. For example, it would be possible to experiment for the first time with new forms of moderating internal meetings.

It is important in this phase for leaders to take enough time throughout the course of around 45 days for them to continually learn more about themselves without longer interruptions.

### 1.4 'Meeting with myself' II (1 to 2 days)

'Meeting with myself' II is the 4th step in phase 1. It occurs in line with the same basic principles as meeting I at the end of around 45 days of the learning and practicing stage. The leader will spend one to two days, as undisturbed as possible by the challenges of everyday business, thoroughly reflecting on their experiences

and insights. The first decisions, for example how to act differently in the future, will be made at this stage. One decision may be, for example, that the leader will set aside 10 minutes every evening to note down and reflect on the experiences of that day at work.

Furthermore, the leader will decide in this 'meeting with myself' II whether they are ready for phase 2 of INCLUDE. The phase for transforming the organisation can then begin, for example by creating the first rough meetings plan. If the leader does not yet feel ready to start phase 2, it is possible to run through the self-reflection phase (phase 1) a second time. It is important to bear in mind, however, that there is no such thing as perfect preparation. Anyone who wants to discover and develop something new must launch out head into uncertain waters. The risk of doing nothing in the digital age is much greater than searching for new shores one step at a time.

### 1.5 Reflection (around 15 days)

This period of around 15 days at the end of phase 1 helps the experiences that have been made up until this point to have a lingering effect. Developments and new patterns of behaviour that are perceived as good and helpful can be tried out further or intensified. New patterns of behaviour can be even better adapted to daily realities and consolidated in this way.

In addition, the decision made regarding the start of phase 2 can be reconsidered in calm. Once the right time has come for phase 2, then the final step is to organise the transition to the phase of transforming the organisation.

## 2nd Phase: Transformation of the Organisation (around 180 days)

Once one or several leaders have gone through the self-assessment phase then it is time to begin the real transformation of the organisation towards a more inclusive understanding of leadership and organisation. This phase, just like the self-reflection phase, also consists of

five steps.

### 2.1 Invitation to everyone – Preparation (around 60 days)

The first step of phase 2 is all about creating a willingness amongst all those involved to change the existing organisational model. This creates the foundations of a successful ongoing development of the entire organisation. The current situation in the organisation is analysed and the basis for change is started through

## 2nd Phase: Transformation of the Organisation

internal discussions and the provision of new information and learning resources. During this first step of phase 2 an authorised leader, for example the CEO, will invite all members of the organisation in writing to the INCLUDE meeting I. This invitation will explain, amongst other things, why this organisation needs a new leadership approach for the digital age. The leader or leaders who are responsible within the organisation will also commit themselves during the preparation phase to working together with the participations without delay on the basis of the results of the INCLUDE meeting I.

### 2.2. INCLUDE meeting I (1 to 2 days)

INCLUDE meeting I is the second step in phase 2. It should be led according to the basic principles of an open space event (see 'Open Space for Organisations' tool above). It is particularly important for participation to be 100 per cent voluntary. The goal is that as many different perspectives as possible should be expressed and new ideas generated in this meeting. All participants should be told by the end of the INCLUDE meeting I at the latest that there will be a further INCLUDE meeting in around 90 days, by which point the results and recommendations for action from the INCLUDE meeting I should be tested and implemented in

the organisation as far as possible, on the basis of collaborative prioritisation.

### 2.3 Learning, trying, and practicing (around 90 days)

In this third step in phase 2, new and already existing teams and individuals will be explicitly authorised and invited to learn, try, and practice, for example, new ways of working together, making decisions, or accepting responsibility. All of those involved can use the 27 tools and methods recommended in the INCLUDE handbook under the five INCLUDE areas of development to help them with this ('leader', 'people', 'structure', 'process' and 'technology'). Some participants will continue to be sceptical about this newly forged path. This is normal. Despite potential doubts, one should continue to assume for the time being in this third step of phase 2 that this new approach, no matter how strange it may seem, is able to work. As long as the approaches are 'safe enough to try', nothing can happen that cannot be easily corrected.

The 12 beta principles outlined in the section 'A new mindset for a new time' (see above) will serve as important points of reference in phase 2. Alongside this, all five areas of development in INCLUDE should be covered if possible. This means that, if possible, at least one new tool or method should be learned, tried and rehearsed for each of the areas of development. All of the tools and methods that seem to be suitable for those involved should come into play. With these tools etc. people experiment and consciously try to discover and follow new paths.

The teams and individuals will organise their own ways of working throughout the 90 days. Within the framework of the 12 beta principles, they are authorised to work and communicate without any further restrictions.

### 2.4 INCLUDE meeting II (1 to 2 days)

At the end of the intensive 90-day period of learning and practicing, the INCLUDE meeting II will take place as the fourth step of phase 2. Participation is 100 per cent voluntary and the same open space rules apply as at the first meeting. The focus of the meeting is, however, different: an important phase has been completed and the results achieved are now evaluated.

In the course of the meeting the participants will come to a consensus about what worked well and whether they would like to continue working in the way that they have tested up to this point in the future. At the same time, participants will become aware of any questions that remain to be answered and any additional ways that the organisation should change. The initial success of self-organisation will already be easily recognisable by this point and will stimulate all those involved to keep moving in this direction. The INCLUDE meeting II concludes the learning section and, at the same time, the transition to a new learning section can be initiated.

### 2.5 Reflection (around 30 days)

Reflection serves as the fifth and final step in phase 2 and provides time for all those involved to mull over what has been achieved. The newly learned forms of leadership in the digital age and of cooperation can be further consolidated and all teams and individuals have time to reach an overall higher level of performance.

The steps of the INCLUDE process model outlined up to this point can and should be carried out repeatedly in order to further reinforce new ways of working and simultaneously generate and test innovative ideas and suggestions for change. On each subsequent repetition of the process it is not necessary for the leader to begin again with the self-reflection phase (phase 1). It is much more helpful for all of those involved to integrate the self-reflection in phase 1 as a permanent practice in their normal working habits.

07

Conclusion





In this survey the theoretical and methodological foundations have been laid for inclusive leaders and everyone who wants to become one in the digital age.

First, it was possible to work out what is changing for leaders in the digital age. In key areas that are relevant for every organisation, there are fundamental changes in their environment as they move from the analogue to the digital world that no leader can ignore. At the same time, it can be stated that many leaders tend to be overwhelmed when it comes to analysing these changes and making good decisions based on their analysis. They must make more and more complex decisions in the digital age, although the environment for this decision-making is changing much faster than before. It is unlikely that this dynamic will slow down again. It is more likely that the pressure to change will continue to increase due to the technological innovations of our time, or at least remain on a constant high.

In contrast to this is the traditional understand-

ing of leadership in predominantly hierarchical organisations led from the top down, in which leaders expect of themselves and their employees that they are permanently capable of making good decisions quickly. There is also the expectation and, for many leaders, the self-perception that they are and must be able to make the right decisions on their own. This illusion of control must first be recognised and then overturned by a large number of the leaders active today.

There is a tendency, however, for something else to happen. For example, many leaders tend to choose the safer option when making decisions where there are several options to choose from. This is to avoid taking an uncertain risk where they would be held accountable for the consequences in a hierarchical system. However, the (digital) future of an organisation cannot be built with a defensive approach. Trial and error as well as taking calculated higher risks are important leadership skills for today and for the future.

The argumentation so far leads to the following interim conclusion: every organisation should open up to the topic of self-organisation in order to, among other things, share the responsibility for making decisions across many shoulders. For this, a holistic approach is important that understands inclusive leadership as the development of both people and the organisation. Leaders can become more effective again if they focus on decentralisation, shared responsibility and joint decision-making. Leadership today is always inclusive. There are institutional prerequisites for this change in many small and medium-sized organisations and enterprises. As a rule, these organisations are led more pragmatically and flexibly than, for example, large companies or corporations. However, the challenges that leaders in both small and large structures must deal with are considerable. In this study, they were clustered into eleven thematic areas. In all eleven areas, leaders, teams, and entire organisations need practical support.

Various theoretical and methodological concepts were identified to be able to identify the right support instruments and tools for this. In their entirety, these lead to inclusive leadership and organisational development becoming possible together in the digital age. The following applies: complex systems should ideally manage themselves. Whenever people are involved, one is dealing with complex systems – meaning that all organisations today are complex. It must also be understood that the control of a system cannot be less complex than the system itself. Hierarchical organisational systems are ‘under-complex’ in light of these insights and therefore less well suited to mastering the challenges of today and tomorrow.

Every leader has a choice and can decide on a leadership approach. To facilitate this decision, five development areas were identified for the INCLUDE approach on the basis of the theoretical insights gained. Inclusive leaders should develop in these areas in the digital age: ‘leader’, ‘people’, ‘structure’, ‘process’,

and ‘technology’. 27 practical tools were allocated to these five areas of development that inclusive leaders can use to implement the INCLUDE approach in practice.

One of the central goals of this study was the development of an easily understandable process model for introducing the INCLUDE approach in practice. This outcome has also been achieved. The INCLUDE process model enables leaders and their organisations to use the INCLUDE approach on the job and to implement it together with their team. The model consists of two phases: a leader phase, in which leaders deal with their own self-image in particular and lay the necessary foundations for the following INCLUDE process of organisational development. And an organisational phase, in which as many people as possible from the organisation and, if necessary, from its external environment work together to jointly develop and implement a tailored new organisational model one step at a time. The guiding principle for all actions and activities in applying the INCLUDE process model comes from sociocracy and is: ‘it’s safe enough to try’ and ‘good enough for now’.

### The advantages of the INCLUDE approach at a glance

- INCLUDE makes leaders effective (again).
- INCLUDE fosters a high level of commitment from all those involved.
- INCLUDE fosters self-organisation, decentralised decision-making, and the autonomy of all those involved.
- INCLUDE is complex and easily applicable at the same time.
- INCLUDE reduces dependence on external consultants.
- INCLUDE leads to all those involved doing what needs to be done.

The complex challenges of the digital age can be mastered with the INCLUDE approach.

08

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