The Advice Process

[Note: this guidance is referred to by Section C.7 of the XR UK Constitution.]

The Advice Process can be practised in many ways, but they share a common factor, which is that anyone can make any decision within the mandate of their role after seeking advice from

1. other roles who will be meaningfully affected, and
2. people with expertise in the matter.

There are two key principles:

- **Advice received must be taken into consideration**. The point is not to create a watered-down compromise that accommodates everybody's wishes. It is about accessing collective wisdom in pursuit of a sound decision. With all the advice and perspectives the decision-maker has received, they choose what they believe to be the best course of action.
- **Advice is simply advice**. No one, whatever their role, can tell a decision-maker what to decide. Usually, the decision-maker is the person in the role with a mandate that relates to the decision, or the person who either first noticed the issue or is most affected by it.

In practice, this process proves remarkably effective. It allows anybody to seize the initiative. Power is no longer a zero-sum game. Everyone is powerful via the advice process.

It's not consensus

We often imagine decisions can be made in only two ways: either by a person with authority (someone calls the shots; some people might be frustrated; but at least things get done), or by unanimous agreement (everyone gets a say, but it can be frustratingly slow).

It is a misunderstanding that self-management decisions are made by getting everyone to agree, or even involving everyone in the decision. The advice-seeker should take all relevant advice into consideration, but can still make the decision.

Consensus may sound appealing, but it's not always most effective to give everybody veto power, which effectively leads to 'minority rule'. In the advice process, power and responsibility rest with the mandate to make the decision. Ergo, there is no power to block.

Ownership of the issue stays clearly with the mandate-holder. Convinced she made the best possible decision, she can see things through with enthusiasm, and she can accept responsibility

for any mistakes.

The advice process, then, transcends both top-down and consensus-based decision making.

Benefits of the advice process

The advice process allows self-management to flourish. Dennis Bakke, who introduced the practice at the American power-generation company AES (and who wrote two books about it), highlights some important benefits: creating community, humility, learning, better decisions, and fun.

- **Community**: it draws people whose advice is sought into the question at hand. They learn about the issue. The sharing of information reinforces the feeling of community. The person whose advice is sought feels honoured and needed.
- **Humility**: asking for advice is an act of humility, which is one of the most important characteristics of a fun workplace. The act alone says, "I need you“. The decision-maker and the adviser are pushed into a closer relationship. This makes it nearly impossible for the decision-maker to ignore the advice.
- **Learning**: making decisions is on-the-job education. Advice comes from people who have an understanding of the situation and care about the outcome. No other form of education or training can match this real-time experience.
- **Better decisions**: chances of reaching the best decision are greater than under conventional top-down approaches. The decision-maker has the advantage of being closer to the issue and has to live with responsibility for the consequences of the decision. Advice provides diverse input, uncovering important issues and new perspectives.
- **Fun**: the process is fun for the decision-maker, because it mirrors the joy found in playing team sports. The advice process stimulates initiative and creativity, which are enhanced by the wisdom from knowledgeable people elsewhere in the organiaation.

Steps in the advice process

There are a number of steps in the advice process:

1. Someone notices a problem or opportunity and takes the initiative, or alerts someone better placed to do so.
2. Prior to a proposal, the decision-maker may seek input to sound out perspectives before proposing action.

3. The initiator makes a proposal and seeks advice from those affected or those with expertise.
4. Taking this advice into account, the decision-maker decides on an action and informs those who have given advice.

Forms the advice process can take

Because the advice process involves taking advice from those affected by a decision, it naturally follows that the bigger the decision, the wider the net needs to be cast.

For minor decisions, there may be no need to seek advice. For larger decisions, advice can come through various channels, including one-to-one conversations, meetings, or online communication.

Some organisations have specific types of meeting to support the advice process, or follow formal methods. The Integrative Decision Making process, which XR UK uses for governance decisions, can be seen as a formal variety of advice process. Some organisations choose to have circles made up of representative colleagues who go through the advice process on behalf of the whole organisation.

When decisions affect large numbers, or people who cannot meet physically, the process can be held online.

- The mandate-holder can post a proposal on the UK Forums and call for comments and then process the advice they receive.
- The team can use decision-making software like Loomio, a free and open-source tool, or Murmur, which embodies Integrative Decision Making. The process for using the advice process on Loomio: start a discussion to frame the topic and gather input, host a proposal so everyone affected by the issue can voice their position, and then the final decision-maker specifies the outcome (automatically notifying the whole group).

Equal Experts, a UK network of software consultants, specialising in agile delivery, has written an open playbook to share their ongoing experience of a real-world implementation of the Advice Process (the organisation had approximately 1100 members in 2021).

Underlying mindsets and training

The advice process is a tool that helps decision-making via collective intelligence. Much depends on the spirit in which people approach it. When the advice process is introduced, it might be worthwhile to train colleagues not only in the mechanics but also in the mindset underlying effective use.

The advice process can proceed in several ways, depending on the mindset people bring to it:

- The initiator can approach it authoritatively ("I don't care about what others have said" or, alternatively, "I fully comply with what others - someone highly respected, or the majority - have said").
- They can approach from a perspective of negotiation or compromise ("I'll do some of what they say so they're happy, but it will increment my frustration levels by 1").
- They can approach it co-creatively, which is the spirit of the advice process ("I will listen to others, understand the real need in what they say, and think creatively about an elegant solution").

Role modelling

Coordinator roles in teams need to be role-models. Successfully distributing authority requires careful, proactive effort. Roles and mandates support this, but Internal and External Coordinators can help further by modelling and demonstrating the advice process in their own decisions. Other team members will take cues from their behaviour.

Modelling and demonstrating can take several forms:

- When you want to make a decision, pause and ask: Am I the best person for this decision? (That is, does it fall principally within my mandate? Might it also affect others' mandates? Am I most closely linked to the decision, or the person with most energy, skill, and experience to make it?). If not, ask the role you think is better placed to take the initiative. If they don't want to, you might be best placed after all.
- If you are the right person to make a decision, identify those from whom you should seek advice. Approach them and explain what you are doing. ("I'm using the advice process. Here is an opportunity I see. This is the decision I propose to take. Can you give me your advice?"). You can also share who else you are asking for advice. Once you've received advice and made your decision, inform those you consulted (and anyone else who should know).

- When colleagues ask you to make a decision ("What should I do?"), instead ask them "What is your proposal?". Share your advice and suggest who else to ask. Remind them the decision is theirs.

For many of us, unlearning the habit of making all the decisions is hard. It requires commitment and mindfulness. If you find yourself falling into the old pattern, take the opportunity to acknowledge your mistake, and restate the importance of the process. This can turn a mistake into a powerful learning moment. Better habits are formed through repeated practice.

[Note: this text is largely copied, with light adaptation, from a longer one that is part of the Reinventing Organizations Wiki. Copyright belongs to the original creators of that text. [Note: Once we have got more of our resources in order, David as SOS Resource Steward will contact Frederic Laloux to check this is OK. He has been a friend to XR in the past.]]
