Holacracy™ Quick Start Guide

About this Document

This guide is intended as a basic guide to help you get started using Holacracy in your organization. Find the latest version at holacracy.org/resources/quickstart-guide. Three things for you to consider as you use this guide:

- Following this guide will not guarantee that you are following the principles or practices of Holacracy correctly. This guide is intended to assist with "bootstrapping" Holacracy in your organization, department, or team.

- This is not a standalone document, just a short guide to help you get the pieces in place. See the Holacracy™ Constitution for the rules and processes of Holacracy, and visit holacracy.org for more resources and trainings on Holacracy.

- Holacracy is a new paradigm for organization and can be difficult or impossible to effectively implement without support or training. For optimal results, we recommend that you get help from a Certified Holacracy Coach, or, if that's not practical, attend a Holacracy Practitioner Certification Training prior to implementing Holacracy. See holacracy.org or contact us for help in finding a coach or training to meet your needs.

Checklist of Steps in this Guide

- ☐ **Determine if You Truly Have an Organization**

- ☐ **Formally Adopt the Holacracy™ Constitution**

- ☐ **Set up a Shared System for Governance Records**

- ☐ **Determine an Initial Structure**

- ☐ **Hold First Governance Meetings & Run Elections**

- ☐ **Set up a Shared "Corkboard" for Operational Items**

- ☐ **Start Tactical Meetings**

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1. Determine if You Truly Have an Organization

Holacracy is a governance system for an organization, not a group of people: it is the organization that is being structured and governed - not the people. In Holacracy, we define an organization as something that exists beyond the people and that can hold a broader purpose even as the individuals come and go.

An organization:

- has a boundary which defines its scope – a "territory" that it controls and regulates.

- has an energetic exchange with the outside world across that boundary; it provides something to/for the world, and receives something back in exchange.

- has a purpose it pursues, work to do for that purpose, and resources to deploy.

If you have a legal entity with property (whether physical, monetary, or intellectual) and some activity it performs in the world, then you probably have an organization by Holacracy's definition. If you are deploying Holacracy to organize a team or department, or any other group or work, get clear on whether and how your entity meets the criteria defined above. If you don't have an "organization" by this definition – as may (or may not) be the case for a movement, community, or social group – then there are other tools you may want to consider, as Holacracy is solely for governing "organizations", not groups of people.

2. Formally Adopt the Holacracy™ Constitution

In order to adopt Holacracy as a new power structure for your organization, you must first use the existing seat of power (whatever that may be) to formally adopt Holacracy, thus ceding that power into Holacracy's "rules of the game". These rules are formally documented in the Holacracy Constitution, and thus ratifying this document as your governing structure is the first step to practicing Holacracy. The existing seat of power which needs to ratify the Constitution will depend on your existing structure, and there may be many viable options depending on the extent you wish to deploy Holacracy. It could be adopted via a formal Board-level resolution or via a CEO policy without a board-level action, or by a

Sample Documents

To assist with your ratification, HolacracyOne offers two sample documents that you can use as templates for creating one appropriate to your situation:

- **For Individual Power Holder** (e.g. CEO, Team Lead, Dept. Head)

- **For a Board**

manager of a department via the due-authority of that manager, or even via consensus if that's the current power structure in operation for your "organization".

Whichever case applies to your organization, make the adoption of the Constitution formal – e.g. capture it in writing, and identify who will act as Lead Link from the individual or group ratifying the Constitution, to the highest-level circle that will practice Holacracy (the "Anchor Circle", which, when it's the whole organization adopting, is often called the "General Company Circle").

The Holacracy Constitution can be more formally adopted as well in legal bylaws (or equivalent), however you should seek appropriate legal advice before considering such an action. At HolacracyOne, we use an LLC Operating Agreement to bind the Constitution as our legal operating system. See this page for an overview of how HolacracyOne has legally adopted Holacracy.

3. Set up a Shared System for Governance Records

The organization's governance records hold its overall structure in detail, and can be used to find the expectations and authorities held by each role. If you are practicing Holacracy properly, they will likely be referred to by everyone on a daily or weekly basis. **The entire system will be undermined if the governance records are not clear and easy for everyone to access.** You can use a wiki or similar intranet-based solution, however HolacracyOne recommends GlassFrog™, a software tool HolacracyOne has tailor-made for the task of streamlining Holacracy adoption, record-keeping, and ongoing practice. You can see HolacracyOne's governance records within GlassFrog here as an example of the system's output.

4. Determine an Initial Structure

Once you have ratified the Holacracy Constitution and have a system setup for holding your governance records, you are ready to determine an Initial Structure for your organization (see Section 5.4 of the Holacracy Constitution). Your first circle, or Anchor Circle, has already been defined in the Power Holder Policy or Board Resolution document from Step #2. The Lead Link of that Anchor Circle is now responsible for bootstrapping the rest of the circles.

Before you start practicing, break your organization into an initial circle structure, starting from the Anchor Circle. This should typically be based on the current departments or teams that already exist, not those which you think *should* exist. Note that for small organizations (<10 people) or a single team, while you may have many roles, you probably have only one circle; if you think you have more, consider that each "circle" in your vision may actually be a "role" within a single circle.
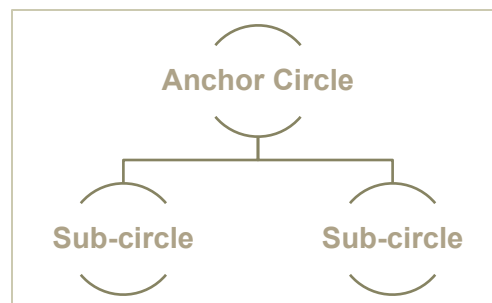
Holacracy is a living system for evolving your organizational structure over time; thus, this initial structure is just a starting point and will change over time with your practice of Holacracy. Don't worry about perfecting it up-front – just get something to start from. You can find HolacracyOne's organizational structure here, and see the governance meeting history of our General Company Circle as an example of how an organization evolves over time.

Once you've determined your initial structure, the Lead Link to the Anchor Circle should do the following for each sub-circle beneath the Anchor Circle (if any):

- Appoint a Lead Link to that sub-circle.
- Determine a starting Name, Purpose, and Scope for that sub-circle.
- Define any initial roles that exist in that sub-circle, and give them the minimal-possible definition just to capture any clarity that already exists in prior documents/systems.
- Trigger the Lead Link of that sub-circle to do the same steps for any of its own sub-circles, if any exist.

5. Hold First Governance Meetings & Run Elections

The Lead Link to each circle should schedule the initial governance meeting for their circle, to hold elections for elected roles. For the initial meeting, the Lead Link may appoint anyone as Facilitator and Secretary of that meeting; for all future meetings, the elected Facilitator and Secretary will manage the meetings, as specified in the Constitution. Note that the entire process, activities, and outputs of this meeting are defined in the Constitution, Article 3.

6. Set up a Shared "Corkboard" for Operational Items

It is important that you have a shared space to visually manage the operational items for each circle, for visibility and clarity into the work of the circle. If you are co-located this can be on a shared wall, although an intranet page or a Google Spreadsheet work as well. The corkboard is used during the Tactical Meetings, and should be available to all circle members at all times.

The corkboard will eventually include the following:

- Checklist Items for each Role, as defined in the Holacracy Constitution, Section 4.2.4

- Metrics for each Role, as defined in the Holacracy Constitution, Section 4.2.4

- Current Projects for each Role, as defined in the Holacracy Constitution, Section 1.4

Initially, it's safe to ignore the first two points, and just post short headlines for any current projects to start. The other two categories will evolve and become clear with time, as-needed.
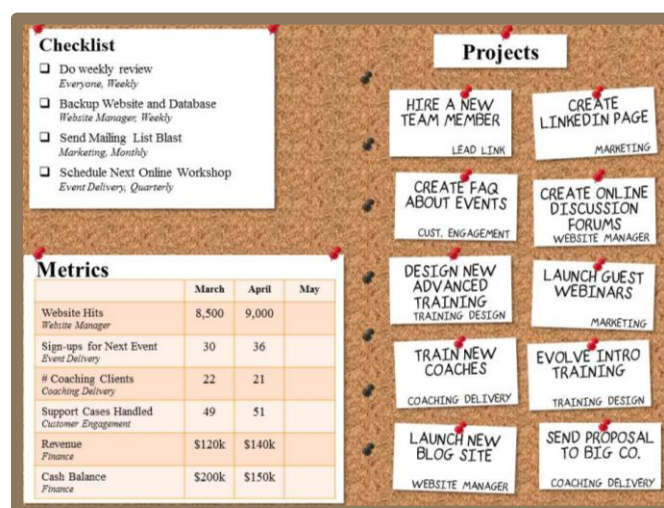
7. Schedule Regular Tactical & Governance Meetings

The Secretary of each circle should now schedule regular Tactical and Governance Meetings for the circle going forward; a typical frequency is weekly for Tactical Meetings, and biweekly or monthly for Governance Meetings, at least to start. Tactical Meetings are for synchronizing the team and removing constraints to getting work done; the process, activities, and outputs of these meetings are defined in the Constitution, Sections 4.6.1 to 4.6.3. Governance Meetings are for clarifying and evolving the power, authority, and expectation structure needed to manifest the organization's purpose, via evolving its role definitions and policies; the process and outputs of this meeting are documented in the Constitution, Article 3, and it is critical to the effective practice of Holacracy that only "Governance Outputs" are allowed from these meetings and captured in the formal governance minutes and records.

Conclusion

We at HolacracyOne hope that this guide has been a valuable resource in helping you bootstrap Holacracy in your organization, and that you continue your practice of Holacracy successfully to improve clarity and transparency across your organization, team, or department.

For further help to refine your practice, see our website for free resources. Or you might consider attending any of our education programs, or seeking direct implementation support from HolacracyOne or any of our licensed service providers. And of course, contact us and we will be happy to assist you in finding an approach that is right for your organization.

This guide provided by:

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