

## **Managing emergence: How practicing organizational consultants view culture building**

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### **Abstract**

As technology and new media create increasingly accessible forms of organization, and empower more people to build communities, the challenge of systematically and intentionally building culture becomes relevant to more people. What defines a “healthy”, “strong”, or “good” culture? Is culture building possible, or is culture so inherently bottom up as to defy intention and system? What is the work of culture building? Does it have clear steps or stages? Are there principles of culture building that can be communicated and taught? Or is the work of culture building fundamentally idiosyncratic and restricted to those few with an inarticulable knack for it? We survey the definitions, perspectives, practices, and insights of 16 professional culture builders: practicing organizational consultants whose practices span large traditional organizations, small teams, multi-organization networks, mission-driven organizations, and decentralized organizations. Organizing and taxonomizing their perspectives and practices, we distill 5 common components of strong culture and 17 common practices for building it. After concluding that culture building work is clear, articulable, and accessible, we develop an argument that organizations and communities should approach culture building systematically and intentionally by empowering a community manager to organize, surface, and focus the needs of members toward a continuously adapting and iterating culture of culture building. With this work, we complement computational technologies for building organizational flows and processes with established social technologies for building shared trust, meaning, beliefs, goals, values, purpose, and identity, toward more meaningful organizations, and a population of leaders who are more effective at bringing people together.



## Introduction

No factor affects organizational life so much, and is so difficult to harness, as culture. Organizational process has been honed to science, with training, mechanisms, and technological advances targeted and refined to train an entire managerial class. Culture, by contrast, remains a mystery. Those who succeed at building it seem to have a knack. It is admirable when it happens, but difficult to measure, teach, replicate, or hold to any of the kinds of standards that we use to guide organizational processes.

For those who have experienced a community with a strong culture, there is clear value in trying to demystify and systematize the process of building it. People in an organization with strong culture feel like they are a part of something that matters for the world, build meaningful relationships and incubate exciting projects, and experience alignment between their personal and professional goals. An organization starts to benefit from coordinating a large number of closely aligned, intrinsically motivated people who see their group as the vehicle for accomplishing what they want to accomplish in the world. For all these benefits, at both the individual and collective level, it is worth demystifying culture change, and articulating the value of treating it intentionally. Just like it should be possible to build an organization that turns out as intended, it should be possible to build an intended culture, one that integrates bottom-up hopes of the membership with the needs of the goal or purpose of the community.

Attention to culture is ever more important and technological advances in organization design get further with the science of process and leave the art of culture neglected and underdeveloped. As the gulf grows, it becomes increasingly clear that an organization's performance depends just as much on the behaviors that are incentivized as those that people internalize, through norms, values, human trust, or tacit knowledge.

We start from an assumption that organizations are more effective when their members feel aligned with others, connected to them, recognized and trusted by them, heard by them, when they are constantly in touch with how they fit into a bigger system that does something they care about.

Culture, for our purposes, is the set of values, mental models, and behaviors that are widely internalized by members of a group. Culture building is an organization getting itself to a point where many members have done that internalization. It matters because when members of an organization follow rules they believe in, that organization gains a consensual route to complex collective initiative and can credibly align its overall goals with the goals of its membership.

From that starting point, is there any prospect of making the process of culture building more systematic and intentional? Is culture building possible? If so, what does the concrete work of it look like? And if so, can that work be articulated and taught to anyone?

Is culture building possible? It sounds like an oxymoron: Can culture that is built be more than propaganda? Is a culture that can be built worth having? Should it be left to emerge, or is there any truth in the idea that a skilled ("central") facilitator can initiate, encourage, nurture, or even guide an authentically bottom up process of cultural development in a way that makes it at least as strong as it would have been on its own?

What is the work of culture building? Take five organizations with very different cultures, each strong and deeply internalized by their members. How did they get there? Were there steps or stages? Was any intentional effort applied toward getting to those states? Were there any commonalities across those organizations in what effort was applied?

Are there principles of culture building that can be communicated and taught? Is culture building an art that only specially trained individuals can perform successfully? Or is there a general approach to culture building that anyone in any org can learn? Do organization's need the "special sauce" of a prized consultancy or inspired leader in order to build teams whose values, practices, and mental models are widely aligned and deeply internalized? Or is there a concrete set of practices that anyone can follow?

In this work, we investigate and compare the culture building practices of organizational consultants across a variety of spheres: large traditional organizations, small teams, multi-organization networks, mission-driven organizations, and decentralized organizations.

Organizational consultants are culture building professionals. They are individuals who have done enough work in enough organizations to develop a general system, however idiosyncratic, for executing culture building and culture change practices across multiple organizations. They have developed concrete practices and processes used by traditional organizations to build strong cultures. By understanding the similarities and differences across practitioners, we can better understand the paradox of a top-down approach to a bottom-up phenomenon, the nature of that work, and how varied, explicit, and effective that work is.

This work is based on an evaluation of the practices of sixteen prominent professional consultants specializing in organizational culture. Based on five informal framing interviews and eleven "simulated interviews," in which our team used quotes from books to fill out an interview script, we qualitatively compare their models and methods, organize and classify them around their common definitions, procedures for culture change, components of culture, and culture building tools and practices. We consolidate these lessons around an argument for treating culture building as any other organizational project management practice. We conclude with additional findings, limitations of the study, and details of our method.

## **Summary**

Considering the very diverse backgrounds and specialties of the practitioners we surveyed, we find striking similarities and informative differences in the definitions and practices they employ in organizational interventions.

Common dimensions of culture. Organizing their definitions and their deeper elaborations on the components of culture, we find common dimensions of culture across informants:

1. Bonding and trust
2. Shared behavior
3. Shared purpose
4. Shared values/beliefs
5. Shared identity
6. And adaptability

Common procedures. Similarly we find that, despite seemingly irreconcilable variety in their philosophical or ideological backgrounds, the practitioners follow nearly the same high-level procedure in working with an organization, involving

1. one-on-one sessions with low-level employees about their personal life goals,
2. facilitated small group discussions that surface common themes publicly,
3. an interactive process of working between managers and small groups to iterate the findings and improve the alignment of the organization with the shared goals and values surfaced by their employees.

Common tools for culture building. Organizing their definitions and their deeper elaborations on the components of culture, we find common dimensions of culture across informants:

1. Care for / invest in / value individuals
2. Big picture frame
3. Good work environment
4. Leadership
5. Empowerment (Inclusive decision making and Autonomy)
6. Rituals/Habits
7. Monitoring
8. PM'ing culture
9. Clear congruent roles
10. Working together/Teams
11. Safety
12. Tap prosocial psychological characteristics
13. Support personal relationships/bonds
14. Communication
15. Pick for fit
16. High standards/effectiveness
17. Ingroup/outgroup

| Authors                                                                                      | Title                                                                                                         | ISBN       |
|----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|------------|
| Kursat Ozenc and Margaret Hagan                                                              | <i>Rituals for Work: 50 Ways to Create Engagement, Shared Purpose, and a Culture that Can Adapt to Change</i> | 1119530784 |
| Steve McMenamin, Tom DeMarco, Peter Hruschka, Tim Lister, James Robertson, Suzanne Robertson | <i>Happy to Work Here: Understanding and Improving the Culture at Work</i>                                    | 989282066  |
| James L Heskett                                                                              | <i>Win from Within: Build Organizational Culture for Competitive Advantage</i>                                | 231203004  |
| Mario Moussa, Derek Newberry, Greg Urban                                                     | <i>The Culture Puzzle: Harnessing the Forces That Drive Your Organization's Success</i>                       | 1523091827 |
| Josh Levine                                                                                  | <i>Great Mondays: How to Design a Company Culture Employees Love</i>                                          | 126013234X |



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|---------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|------------|
| Ben Collins-Sussman and Brian W.Fitzpatrick                   | <i>Debugging Teams: Better Productivity through Collaboration</i>                                     | 1491932058 |
| Paul W.B. Atkins, David SloanWilson, Steven C. Hayes          | <i>Prosocial: Using Evolutionary Science to Build Productive, Equitable, and Collaborative Groups</i> | 1684030242 |
| Timothy Lister and Tom DeMarco                                | <i>Peopleware: Productive Projects and Teams</i>                                                      | 932633439  |
| Daniel Coyle                                                  | <i>The Culture Code: The Secrets of Highly Successful Groups</i>                                      | 1847941273 |
| Elizabeth K. Briody, Robert T.Trotter, and Tracy L. Meerwarth | <i>Transforming Culture: Creating and Sustaining a Better Manufacturing Organization</i>              | 1137408197 |
| Charles H. Vogl                                               | <i>The Art of Community: Seven Principles for Belonging</i>                                           | 1626568413 |

**Table 1: The books reviewed in this work.** Our major finding is that these authors, despite their varied backgrounds, show many commonalities in the approaches to culture building that they prescribe (Ozenc and Hagan 2019; DeMarco et al. 2021; DeMarco and Lister 2013; Heskett 2022; Moussa, Newberry, and Urban 2021; Fitzpatrick and Collins-Sussman 2015; Levine 2018; Atkins, Wilson, and Hayes 2019; Coyle 2019; Briody, Trotter, and Meerwarth 2014; Vogl 2016).

## Findings

After proxying and comparing the mental models of more than a dozen professional consultant teams (5 from interviews and 11 from their books; Table 1) several themes pop up, despite the fact that these professionals were trained under all kinds of traditions and work for all kinds of companies. Here we report the results of a qualitative clustering of common themes across definitions, procedures, and tools.

### Common definitions of culture

The consonance across quite different practitioners is evident in these four definitions of culture, collected from authors in four different traditions:

1. “The shared **assumptions, values, behaviors, and artifacts** that determine and reflect “how and why we do things around here”” — Heskett, Win from Within
2. “Our definition of culture, “**assumptions, expectations, beliefs, social structures, or values** guiding behavior,”” — Briody, Trotter, Meerwarth, Transforming Culture
3. “A set of **beliefs** and resultant observable **behaviors** that determines—more than any other factor—the performance of the group.” — DeMarco, Happy to work here
4. A culture is “a set of shared **experiences, values, and goals** that is unique to every... team observed” — Fitzpatrick and Collins-Sussman, Debugging Teams

As promising as this consonance is, these definitions are incomplete and ambiguous. Is Briody naming “behavior” or the “values guiding behavior”? What is the difference between beliefs and experiences? And why are all of these definitions missing other seemingly important aspects of culture, like shared identity (also called group identity, collective identity, or sense of belonging by different authors)? Shared identity appears in none of these definitions, but does appear in more than half of the books we reviewed as one of the things that a culture builder tries to maximize.





So beyond high-level definitions, what in practice and experience do culture building practitioners target and how? We identified similarities and reconciled differences to build a holistic sense of the kinds of things that communities can learn from the professionals when it comes to articulating what they mean by “culture” and what it means to build it.

|                 | Puzzle Heskett | Prosocial Rituals | Coyle Vogl | Happy Levine | Briody | Collins-Sussman | Peopleware |
|-----------------|----------------|-------------------|------------|--------------|--------|-----------------|------------|
| Bonding/Trust   | x              | x                 | x          | x            | x      | x               | x          |
| Shared Behavior | x              | x                 | x          | x            | x      |                 |            |
| Shared Purpose  | x              |                   | x          | x            | x      |                 | x          |
| Shared Identity | x              | x                 | x          | x            |        | x               |            |
| Adaptability    |                | xx                | x          | x            | x      |                 |            |
| Shared Values   | x              | x                 |            | x            | x      |                 |            |
| Shared Beliefs  |                |                   |            |              |        |                 |            |

**Table 2: The components of culture, mapped to books that identified them.** This table shows specifically which works emphasized which components of culture. Bonding/trust were named by the greatest number of authors, while Shared Values and Beliefs were named by the fewest. Note that Shared Values and Shared Beliefs are nearly perfect substitutes, explaining why we combine them.

## Common components of culture

Here are the dimensions that we identify as constituting an organization’s culture, ranked in terms of how many authors named them as core elements of strong cultures. From top to bottom:

- Bonding, trust. (9 authors out of 11)
- Shared behavior. (7 authors)
- Shared purpose. (7)
- Shared values/beliefs. (7)
- Shared identity. (6)

These were all mentioned by at least 50% of authors. We also identify one “runner up” quality, adaptability, which was named by 5/11 authors. Not present in this list are qualities like happiness and fairness/transparency, which were both mentioned by only 2/11 authors as core elements of strong cultures, and diversity, which was named by 1. We also excluded “supportive work environment” and “psychological safety,” which were named as dimensions of culture by

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some authors, and tools of culture by others (“outputs” and “inputs” of culture building work respectively; we treat them here as inputs).

We now present the components in more detail, starting with shared purpose.

### Shared purpose

Shared purpose is a shared sense of what the group is trying to accomplish in the world: the world that the group is working toward. People often get a sense that their lives are meaningful from identifying a purpose in the world that they want to serve. And when your peers serve the same purpose, you get meaning from their activities as well. The feeling that one is an integral part of something special is a signature of strong culture. When a group has a shared purpose, that purpose can be used to define the group as a coherent social unit oriented around something that matters for the world.

Most authors identified shared purpose as a defining element of culture. Of the “Shared X” components of culture, it is tied with “shared behaviors” for the most commonly mentioned. Those authors who didn’t mention it seem more likely to have mentioned Adaptability instead (Table 2). We allow for shared purpose to include qualities that some authors named as near synonyms, such as “shared goal” or “common goal,” despite the possibility that a “goal” may be a bit more granular and achievable than a purpose: “provide the best customer experience in the auto parts industry” can be a goal and not a purpose. We favored “purpose” over “goal” because it seems to be the stronger symptom of a healthy organizational culture.

Because of the endemic circularity and mutual influence of all of these concepts, it is worth entertaining each as an input to culture rather than an output from it. When one’s peers serve the same purpose, there is more reason to serve them, bond with them, and work and learn with them. This makes shared purpose a credible supporting mechanism for the other qualities of bonding, shared behavior, shared identity, and beliefs.

Another quality of shared purpose that is important to emphasize is that it is one of the more designable or actionable of the dimensions. Although it is not a simple matter to give a person a purpose that they deeply identify with, communities can actively attract, select, or self-select for people who have already internalized their shared purpose.

Some examples of activities a community can perform to work toward shared purpose include

1. publishing a self-description that includes a vision for the world,
2. setting an expectation that participation is based on internalization of that purpose, and
3. using the community’s purpose to target recruitment and drive its actions.

### Shared values and beliefs

Values or beliefs are the qualities that communities use to narrow down the means they are using and concrete outcomes they seek. Values and beliefs act a bit like purpose, as a source of constraints on the strategies that a group will center on. But they are different from purpose in a “how” and a “what” sense. Two people may have a purpose of using decentralization to empower the world’s people, but what that looks like is very different if you constrain that

outcome to represent diversity, equality, and fairness values, or if you have a conveniently simplistic worldview focused entirely on, say, freedom (“one value to rule them all”). But like purpose, people use their values as a source of life meaning (“without my integrity I am nothing”), so a group with shared values is one whose members can involve each other in their pursuit of meaning in life. That makes shared values a driver of precisely the kind of soft, insubstantial, but compelling collective efficacy that makes culture worthwhile for groups to pursue.

Above and beyond the value of a community sharing values is the value of sharing “good” values. Informants shared no common core of values to strive for. Several advocated for the value of harnessing competition, but they ultimately put much more emphasis on prosocial values of cooperation, teamwork, trust, fairness, and openness. To keep a statement of values from devolving into a list of pleasant words and empty slogans, a community should be selective in focusing on the few of them that most bubble up from the membership.

We combine shared beliefs and shared values into one construct, with encouragement from the data. On their own, values and beliefs are identified as important by the fewest authors. They are both mentioned by only four of eleven authors. But looking more closely, only one author commits to them both as distinct concepts (Table 2). Every other informant who identifies one as central omits the other, suggesting that they are being treated as alternatives or synonyms, or maybe as unsatisfactory alternative words for a cluster concept that each imperfectly represents. At the end of the day, the words “purpose”, “behavior”, and “identity” are already so vaguely overlapping, and already occupy enough of meaning space, that the negative space leftover for the more marginal “values” and “beliefs” may be an awkward union of the semantic bubbles that remain.

What does it look like to treat values and beliefs as “inputs” rather than outputs? They are both constraints on the strategy and behavior that one will use to accomplish a goal. So when people have strong shared values and beliefs it may be that much easier to converge on shared behaviors. And to the extent people identify with their values, a community with strong shared values is selecting for people who are prone to finding a shared identity.

Like shared purposes, a community can converge on shared beliefs and values by stating them concisely and using them as a litmus test for membership and a basis of shared identity. They are a less effective lever than shared purpose because an organization is likely to have just one purpose but several values and beliefs, and because purpose more literally defines a community’s activities.

### Shared behavior

Shared behavior is a large umbrella which includes organizational processes (convergence of behavior on how the organization operates in a way that communicates the legitimacy of those processes), rituals (convergence of behavior around actions that reinforce collective identity), and teamwork (shared behavior in a different sense: not common behavior of many people, but coordinated behavior of many people to a team-level “behavior”). The power of “flow states” for happiness and job satisfaction give one vivid mechanism for how behavior becomes a tool for personal life meaning. Sharing those states with others, and generally working in close concert with others on a community’s activities, intertwines members’ sources of meaning with a

contribution above and beyond the binding effect of shared purpose, beliefs, and values. For example, behavioral evidence in evolutionary anthropology shows that cooperative effort and synchronization of behavior are common elements of ritual (Fischer et al. 2014). According to this literature, the shared behavior of a ritual literally expands a person's experienced sense of where their self ends in space to include the bodies of others.

Shared behavior was next to shared purpose as the second most mentioned element of culture that our practitioners independently identified as a core element of strong culture (7/11). Nearly every author who identified shared identity or shared values also mentioned shared behavior (as opposed to shared purpose and beliefs, which occurred more with each other than either did with behavior).

As a lever or input (rather than output or quality), shared behavior is harder to use as a basis of organizational boundaries than shared purpose or values, but it is easier to change. That said, changing the behavior of a group of people, though easy relative to other shared qualities, is hard in an absolute sense: it takes nudging, buy-in, monitoring, reinforcement, and iteration. Habit, routine, and the actions of others are very powerful determinants of behavior, so when bad behaviors are entrenched, they can be very hard to change. Despite steady advances in the behavioral sciences, the best baseline predictor of a person's behavior in the future is their behavior in the past.

The best tool for fostering shared behavior in a community may be teamwork. Dividing an organization's activities across many stable small teams forces people to coordinate their individual behavior toward collective ends in a way that the work of behavioral monitoring and reinforcement can be distributed to the membership. Experiencing success as part of a team reinforces the value of shared behavior, and emphasizes the idea that the group is the individual's best vehicle for pursuing personal meaning.

### Bonding/trust

Bonding is the quality of feeling kinship with another person. We distinguish it from shared identity by treating identity as a relationship between the individual and the group, while bonding is a relationship between individuals. A closely-knit team of four people might have four manifestations of group identity (each of the four identifying as the whole group) but six pairs of bonds (a fully connected network of 4 nodes has 6 links). Feeling a bond to many people in a group helps associate one's sense of personal meaning with the group. Many authors named trust, which we group with bonding because most talk of trust was as an output of a bonding process, usually because of work in an effective small team. With trust in place, people can reorient effort from monitoring each other to producing with each other. Under a condition of trust, another's actions toward the community's purpose are a contribution to one's own personal sense of meaning within the group.

The importance of this dimension is apparent from the fact that it was mentioned by 9 of 11 authors, over 80%. This is the closest to consensus we encountered in this work, either on the side of cultural dimensions or inputs to culture change.

However hard it is to change what someone does, it is harder to change how they feel. Since bonding and trust are feelings, it makes sense that we treat them as one of the least actionable of

the dimensions. They are much more a result of culture building than an input to it. Still, like purpose, values, and identity, bonds/trust can be the basis of selection for new members. The mechanism is a bit different. Purpose, values, and identity can be used for recruitment via “broadcast” means: a group’s impersonal public description of itself can engage an aligned person even if they have no prior relationships in that community. By contrast, bonding and trust aren’t suited to selection by broadcast (I can’t tell you in a blurb that you trust me) but they can be selected for by focusing growth and recruitment on the friends and colleagues of existing community members (word of mouth growth). A newcomer begins in the community with one or two bonds of trust with those who recruited them, and their integration in the community can focus on increasing their count of interpersonal connections, by including them in a team, supporting social events, or with other levers here.

Because teamwork and co-work are widely recognized as a primary mechanisms of bonding, everything that fosters teamwork (clear roles, emphasizing prosocial characteristics, leadership, and inclusive decision making) can contribute indirectly to bonding. Two authors also named vulnerability as a primary cause of trust and bonding, which is worth mentioning because vulnerability can be displayed unilaterally by anyone, making it actionable at the individual level.

### Shared identity

Shared identity can mean three things:

1. People in one’s group personally identify with the same broad social labels (Being in the same ethnic group as others)
2. A social label has emerged that is synonymous with the group’s membership (being affiliated with UC Davis makes one an Aggie).
3. One’s subjective sense of the boundary of their self is expansive enough to include the physical bodies of other people in the group.

The authors in this review tend to mean the second, but all three are a source of aligning an individual’s pursuit of meaning in life with the activities of a group of others who are pursuing meaning for themselves. Identity is powerful, and many fundamental theories of human culture and sociality take group identity as a primitive. Although it wasn’t any kind of majority view, at least three authors mentioned how in-group psychology, by supporting group identity, becomes a powerful tool for engaging culture. This may sound dangerous: a valued and humanized in-group seems to imply a devalued and dehumanized out-group (Hassan 2015), but several authors independently described a mechanism that seems to avoid this: they keep the basis of shared identity more on the community and its positive shared values and purpose, and less on the negative characteristics of outsiders. Though it is effective, dehumanizing out-groups is not necessary for strong in-groups.

The third sense—the evaporation of boundaries between you and other people—is the most cognitive and unfamiliar, but it does exist and, where it does, is an especially powerful driver of culture. It is well documented that rituals around the globe target this sense specifically, and it may be a powerful target for experimentation among communities looking to intentionally cultivate a strong sense of culture. The same research community cited for the power of shared behavior and ritual identifies one effect of ritual as the creation of a visceral feeling of oneness



with others in the ritual (Xygalatas et al. 2013).

Shared identity was identified as a core quality of strong culture of 6/11 authors, just over half. Nearly every author who named shared identity also named bonding/trust: consistent with a conjecture that the two qualities are strongly mutually self-reinforcing. Another observation is that the six authors who named shared identity as core were the six who associated culture with the largest number of qualities: every author who named shared identity named at least 4 of the 5 qualities we report here, while none of the authors who converged on three or fewer included identity in their three (or fewer). One interpretation of this is that shared identity is squarely in the centroid of mental models (being named by the informants with the most “typical” understandings of culture). Another is that it may not be so much of a core attribute as a supporting one. Regardless of the interpretation, shared identity seems to be a typical quality of the most maximalist and pluralistic mental models in the study.

Ritual, teamwork in small teams, and use of collective language in group communications are all straightforward tools for cultivating shared identity. But overall we interpret this dimension as less of an input lever and more of an output cultural quality. Communities that use all of those tools; ritual, teamwork, “we” language, and more; can still easily fail to develop collective identity. It seems likely that shared purpose and bonding are necessary pre-requisites to the more powerful and encompassing sense of shared identity, especially the deeper and more visceral varieties of it. Ultimately, shared identity seems more “downstream” from the other qualities because it is hard enough to change what someone does, and even harder to change what they feel. On the other hand, identity is like purpose and values in that it can be selected for during recruitment, but only in its first sense, which is in terms of broader pre-existing social labels. The deeper sense we target here, perfect overlap between group membership and its associated identity group, by definition can’t be a basis for self-selection: if members can adopt that identity before they are members of the group then there isn’t perfect overlap between the group’s membership and its community of identifiers.

#### “Runner up”: Adaptability

Adaptability is an ability of a group to change with changes in its membership, environment, purpose or other elements. Practitioners also report it in terms of a culture of learning, a culture of open-mindedness, a culture of continual refinement/improvement/quality, and a “flat” culture of openness to the contributions of all members.

We are not treating adaptability as a dimension or quality of culture in the way that the others are. But because it was mentioned by enough authors (5/11, just less than half), it seems important to include tentatively. It isn’t clear here that “adaptability” can be a property of a healthy culture in any more meaningful way than everyone internalizing it as a value. Put another way, it may be that when we talk about the dimension of “shared values,” we aren’t talking about *just any* values, but “good” ones like “commitment to learning,” “open-mindedness,” and perhaps adaptability. Under that way of looking at it, the cleaner framework excludes “adaptability” as a standalone quality, and instead amends “shared values” in the direction of “good shared values.”

One strength of including adaptability as a core component is that it seemed to temper the vulnerability of shared purpose, values, beliefs, behavior, and identity to ossification. Many of

these authors see a healthy community as something that changes and grows, and that means leaving space for a community's shared commitments to change and grow as well.

### **Common tools of culture building**

In addition to organizing practitioner insights into the components of culture (“*What qualities does culture building build?*”) we also organized the practices they employ in the work (“*What inputs does culture building require?*”). There are more practices than qualities, and generally less agreement across practitioners on what practices are effective. The greatest agreement on a single tool was 8 of 11, and we include in our taxonomy all qualities that were mentioned by at least 3 of 11 practitioners. By setting the lower bar at that level, around 25% agreement, we err on the side of inclusiveness. These criteria identified 17 common practices, what we will call “levers,” organized by level of agreement, which may not coincide with effectiveness or ease-of-use:

1. Care for / invest in / value individuals (mentioned by 8 informants of 11)
2. Big picture frame (7 informants)
3. Good work environment (7)
4. Leadership (6)
5. Empowerment (Inclusive decision making and Autonomy) (6)
6. Rituals/Habits (6)
7. Monitoring (6; 2 event-based, 2 time-based, 2 event-based and time-based)
8. PM'ing culture (5)
9. Clear congruent roles (5)
10. Working together/Teams (5)
11. Safety (5)
12. Tap prosocial psychological characteristics (4)
13. Support personal relationships/bonds (4)
14. Communication (3)
15. Pick for fit (3)
16. High standards/effectiveness (3)
17. Ingroup/outgroup (3)

Not included, and notable for being passed over by informants are Support Happiness/Fun (2), Conflict resolution (2), Fairness and transparency (2), Foster diversity (1), Onboarding (1)

To make them easier to compare, we organize them into four types of lever:

- Prerequisite levers aren't enough to create a strong culture, but they have to be in place for any targeted culture building work to be effective. Breathable air could be a pre-req lever, because a basically unhealthy and unpleasant work place will impede constructive culture building effort.
- Direct levers have a direct effect on specific cultural dimension. How do you create shared behaviors? Act with other people at the same time in the same way. Direct levers capture the idea that some of the outputs of culture building can also be seen as inputs.
- Indirect levers are less specific in their effects, and may have a more complicated causal path to the dimensions they affect. Encouraging leadership roles doesn't



directly increase shared behavior, but it creates a role who can coordinate many participants into acting in a shared way.

- Peripheral levers are those that were not mentioned by many informants, but which I retained anyhow because they seemed worth including. They have the least evidence from the literature.

### Pre-requisite levers

#### *1. Care for / invest in / value individuals (8 mentions)*

The number one area of agreement across culture building practitioners is that communities should invest actively in making individuals feel valued. Examples include norms of offering personal onboarding, access to community resources of value, and being proactive about uncovering latent community member needs that the community could serve. There are many possible mechanisms by which valuing individuals could improve community, but one is that people are in a better position to see the community aligned with their personal pursuit of meaning if they are getting a message from the community that they have something unique to offer, and even that they are valued enough to have a say in how the community might change to better align with the individual. Although it may seem to elemental to recognize as a central (the most central) lever for culture building, it is easy to see this as a necessary prerequisite to several of the dimensions of culture, or as something that makes culture building easier.

#### *2. Good work environment (7 mentions)*

One lever of culture change identified by almost 2/3 of practitioners is surprisingly mundane: provide a work environment that is functional, pleasant, comfortable, and that supports all the kinds of work that have to be done in the community. This can refer to non-physical qualities of a work environment, like a low-pressure environment, or non-physical qualities of virtual work environments. To interpret this for online spaces, it could describe being intentional about the design of an online work coordination platform. Like “Value individuals” or, backing out even further, “Breathable Air,” “good work environment” is more of a prerequisite for a healthy culture than a particular targeted and incisive tool for crafting culture specifically.

There were some interesting tensions in this dimension. Two authors interpreted “work environment” to include (their own contradictory) attitudes toward time. The book *Peopleware* emphasized a feeling of “low time pressure” that freed members to build to their own internal standards of pride and excellence, rather than to the minimal standard necessary to meet spec and ship product. By contrast, the book *Happy to Work Here* encouraged a more fraught and adversarial relationship to time, arguing that a sense of working (together) against the clock can cultivate a sense of togetherness. The disagreement is a sign that there is room for interpretation; that it may be more important for a community to have some attitude to time than for it to have one of these specific attitudes toward time.

#### *3. Clear congruent roles (5 mentions)*

Members of a community should have clear roles, orchestrated to prevent overlap and wasted effort. This is a very structural and low-level lever that speaks more directly to shared behavior than other qualities. Well-defined roles ensure that two people doing complementary work can experience the benefit of serving the whole by serving each other.

#### *4. Safety (5 mentions)*

This is an umbrella term that we use to combine several concepts that we observed, including physical and social senses. On the physical side, one book in our sample focused on culture building in manufacturing organizations, where physical safety can be a concern, and attending to it can make people in an organization feel cared about and listened to (the bonds formed during unsafe situations—e.g. military teams during armed conflicts, or in disaster response—seems to indicate that relative safety is more important than actual safety). On the psychological side, people should be spared a toxic work setting and, further, should ultimately be granted the trust and latitude to take risks, make mistakes, and feel comfortable being vulnerable. Members suffering from the stress of economic scarcity, job insecurity, or other hard times can also be seen as lacking the safety prerequisite.

Although safety may seem obvious as a prerequisite input to culture building, adherents of the recent interest in psychological safety treat it simultaneously as an input and output (a basic dimension of strong culture) (Clark 2020). We treat it as an input because it is more actionable than most dimensions. Even those who center it in culture building put most of the focus on the other beneficial effects to a community when safety is high.

#### Direct levers

For all of the dimensions of culture there is a lever that targets that quality more or less specifically. After highlighting active selection (“pick for fit”), the one lever that hits almost all of the dimensions, we go through five levers targeting each of the five dimensions fairly specifically.

#### *1. Pick for fit (3 mentions)*

Many communities have little control over who joins them. Still, they have more control over that than over who their members become, and ultimately enough to make a difference. This can be through active selection, artful use of self-selection, or even differential rewards/attention to newcomers on the basis of their fit. This isn’t a direct lever for a specific culture dimension, it actually hits several of them.

Although lowest in the list in terms of mentions by culture building practitioners, selection for new members is notable for its actionability. Purpose, values, and identity can be broadcast in concise packages to attract people who already internalize the community’s core commitments and fundamental source of meaning. Bonding and trust can be selected for by focusing on word-of-mouth growth and incentivized recruitment of existing members’ outside friends and colleagues.

*2. Big picture frame (for the cultural dimension “shared purpose”; 7 mentions)*

“Big picture frame” describes organizational communications that connect the work of the community to its broadest aspirations for the world. This activity seems to serve “Shared purpose” fairly directly. How does one give people a sense that they are a part of working toward something larger that’s important for the world? Tell them, regularly, on signage, during onboarding, at meetings, and in whose contributions the organization highlights.

*3. Tap prosocial psych characteristics (for the dimension of “shared values and beliefs”; 4 mentions)*

Although there is variation between individuals, and the effect can be subtle, humans are hardwired with preferences for the outcomes of others, via expressions such as altruism, fairness, reciprocity, and inequality aversion. These expressions are very sensitive to social context and training, and can be tuned up by environments that reward them, and nearly entirely suppressed by communities that punish them. Supporting them serves culture by building trust (by giving constituting evidence of trustworthiness), making participation in the community personally rewarding (emotionally and even materially), and by increasing the efficiency of the community toward its purpose (by leveraging the synergistic benefits of cooperation).

Signaling, selecting, and highlighting prosocial behavior ensures that the community’s shared values and beliefs includes values and beliefs that culturally encode cooperation.

*4. Rituals/Habits (for “shared behaviors”; 6 mentions)*

Rituals and habits are a lever for culture building because they are an excellent tool for establishing, developing, and maintaining shared purpose, values, behavior, and even identity. A majority of practitioners also emphasized the importance of this lever. Just as “Big picture frame” as a lever targets the “Shared purpose” dimension directly, this dimension speaks directly to “Shared behaviors.” The book “Rituals for Work” in our sample, by Ozenc and Hagan, is focused entirely on a catalogue of rituals by type.

*5. Support personal relationships/bonds (for “interpersonal bonding/trust”; 4 mentions)*

Cultivating a dense network of interpersonal bonds and trust was named by the greatest number of practitioners as a fundamental dimension culture. But it is also one of the least actionable, in the sense that people can’t be forced to feel connected to each other. Because it is based on the sum of the links between pairs of people, the quality of “bonds and trust” is like voting: it is defined by small actions of many people (unlike a big picture framing of the work of the organization, which any single person can broadcast unilaterally). Like voting, that requirement for coherent distributed action suggests that, when it works, it is because a strong, engaged culture is already in place. Still, practitioners generally treated trust and bonding as something that could be attended to, through indirect means like encouraging water cooler culture, celebrating birthdays, and other mundane excuses for non-work social interaction: off-topic “third places” for developing a connection that envisions personal relationships with substance

beyond the work context.

#### *6. In group/out group (for “shared identity”; 3 mentions)*

Emphasizing the community’s identity as a distinct, exclusive, and important in-group is a basic and ubiquitous tool for building shared identity. This often comes with identifying an out group to contrast against, but out groups are not a necessary part of cultivating in-group feeling. It seems to be enough that the community can say “Unlike the rest of the world, we care about X and that is why we are the best place in the world for making Y happen.”

### Indirect levers

#### *1. Leadership (6 mentions)*

Over half of practitioners agree that the top-down lever of active leadership is an important part of fostering the bottom-up quality of culture. This conclusion may be counterintuitive at first, but rewards consideration, especially of the type of lead that informants describe. They don’t mean just anyone: the concept seems to carry with it qualities like humility, trustworthiness, excellent communication, depending on the author. A leader can coordinate the activities of a team, leading to high morale through better synergy and less wasted effort. A leader is a focal point for information as well, and can play that role for emotional support, onboarding, conflict resolution, or any function that needs extra attention, or that isn’t yet fully in community hands. A leader is also a meta-lever: they can implement all other major levers: valuing people, instilling rituals, reminding people of the big picture, and monitoring shared resources. A legitimate trusted actor can help an organization apply the priority and focus necessary for culture to change in a reliable, beneficial way. They need not be appointed: any person demonstrating this sense of ownership and collective responsibility is a leader by definition. They also needn’t be singular or in any way formal: cultivating the quality of leadership need not imply distinguishing leaders.

More hints about the qualities of effective leadership can be gleaned from three qualities that Heskett identifies as bad for culture:

- frequent leadership turnover,
- frequent reorganization, and
- a loss of contact between the top and lower levels of management.

#### *2. Empowerment (Inclusive decision making and Autonomy; 6 mentions)*

A majority of practitioners endorsed proactive involvement of individuals in organizational decision-making, either through inclusion in more decision-making processes or support for a high degree of autonomy. But for an organization’s members to exercise their rights to participate in decisions, it is not enough to technically provide means to participate, the organization must also instill in members the importance of being an informed and active participant. One strategy may be to support inclusion at many scales. Organization of the community around small inclusive teams scaffolds participation norms, and many other signatures of strong culture (see

“Working together” below).

In the process of identifying this lever, we merged autonomy and shared decision making. Both reflect a commitment to empowerment of members, but they accomplish it in very different ways. It may be seen as conflicting with Leadership above, but the other side of it is that a user trusted with autonomy is being treated like a leader and is on track to gain those skills, whether they hold a formal role.

### *3. Monitoring (2 event-based, 2 time-based, 2 event-based and time-based; 6 mentions)*

About half of practitioners described monitoring as an essential tool for culture change. This may evoke the idea of monitoring community members for rule or norm violations, but the focus of practitioners was almost entirely on monitoring the progress of culture building initiatives, or closing the organization’s information feedback loops generally. For an example, it is not enough for an organization to implement more welcoming onboarding, it must evaluate the onboarding changes it implements to see if those interventions are having the desired effect, and/or unintended consequences.

When they invoke monitoring, practitioners imagine two types in about equal proportion: periodic monitoring (checking in on programs every month or so) and event-based monitoring (check in on programs after an event, such as a conflict, leadership change, or new program deployment).

### *4. PM’ing culture (5 mentions)*

Several informants suggested an intentional project management (PM) approach to culture building (although only Briody makes the connection to PM’ing explicitly). Culture change is ideally a deviation from the status quo in a collectively intentional direction. Deviations from the status quo should be planned. Although beneficial culture change can “just happen” without planning, it is no more likely to happen spontaneously as detrimental culture change.

This lever may be seen as forming a complex with the indirect levers of Monitoring, Communication, Empowerment and Leadership (every indirect lever except high standards), each of which satisfies a part of this one. It anticipates the main recommendation of this work, which is to treat culture building intentionally and systematically by empowering a community manager.

### *5. Working together/Teams (5 mentions)*

Use of small teams organizes the social system to ensure regular contact with a small group of the same people, enabling the fostering of peer-to-peer bonds and trust, the quality that the most authors identified as a fundamental dimension of the peer-to-community experience of culture. Teams are also an efficient way of organizing work, and many practitioners, after working with a community to develop its goals for its culture, implement those goals by delegating them to teams in the organization. In how it develops, instills, and reinforces culture, the small goal-oriented group is a focal point of culture and a seemingly fundamental tool for building it in

organizations.

Like leadership, a design decision to include teamwork has implications for an organization's formal structure, as it may constitute a step in the direction of hierarchy, and probably requires intentional planning to avoid this outcome.

#### *6. Communication (3 mentions)*

Practitioners who name Communication as a lever of culture building tend to be thinking about broadcast communication from leadership. Much of creating shared purpose, values, belief, behavior, and identity is leveraging authority positions in order to habitually communicate those qualities. The use of top-down communication doesn't imply that it's better than bottom-up communication (which would be peer-to-peer expressions of these qualities). Both are good and important, but top-down probably gets highlighted by practitioners as a lever because it is more actionable: for people taking responsibility for culture change a one-to-many top-down communication has the same cost as each peer-to-peer message; top-down is efficient and actionable. This lever was only highlighted by a few practitioners, maybe because it is implicit in so many of the others. We don't count it as a prerequisite lever because of how practitioners focused on broadcast specifically (to the exclusion of peer-to-peer, which is most of communication, and the least actionable or controllable).

#### *7. High standards/effectiveness (3 mentions)*

Several practitioners observed that communities could strengthen their cultures by focusing on producing very high quality outputs (products, software, studies, results, whatever it is the community makes). There isn't much agreement on the mechanism by which this improves an organization's culture, probably because there are a lot of routes from norms of excellence to strong culture. But put most simply, if people are encouraged to build to their own internal standard, a standard that is based on making a personally meaningful contribution to the world, then their work with others in the community to that standard will create strong bonds, and reinforce their shared purpose, values, and identity. The book *Peopleware* put particular emphasis on the importance of minimizing time pressure and letting community members meet their own standards to build something they're proud of.

#### Peripheral levers

Aside from the major levers that were mentioned by several authors, many more suggestions were just mentioned once or twice. We highlight a few of these, despite their being overlooked by practitioners in our sample. They may or may not be as comparably important as the levers that attracted most attention across practitioners. These include the value of fostering happiness and fun, the value of having intentional conflict resolution mechanisms, the value of fairness and transparency in how people in leadership positions operate, the value of diversity (broadly construed), and the value of intentional onboarding. This of course isn't to say that diversity or onboarding were never mentioned more than twice in the systems developed by authors, just that they weren't centered.



## **Recommendations: Community managers for intentional culture change**

Can a group's culture be planned and implemented by a lead? We argue that the work of culture building should be invested in a community manager who is responsible to the community, and who uses member input to guide the planning and execution of culture building initiatives. One clear finding of this investigation is that an organization's cultural dimension must be driven by bottom-up needs. But that doesn't exclude an intentional managed approach to surfacing and satisfying those needs. As informant Heskett argues in *Win from Within*, "If you don't methodically set your culture, then two-thirds of it will end up being accidental, and the rest will be a mistake."

Certainly an organization's culture will evolve and even grow without leadership. So why would an organization invest resources in doing what will happen anyway. In *Win from Within*, Heskett argues: "If you don't methodically set your culture, then two-thirds of it will end up being accidental, and the rest will be a mistake." In the picture that this and other authors paint, only a fraction of bottom-up hopes assert themselves without active support and encouragement.

It is precisely the inherent bottom-upness of culture that implicitly empowers any individual to give themselves inordinate power over the culture, whether or not they are representative of the group, or even beneficial to it. Culture can grow, atrophy, or even neutrally drift. The bottom-up nature of culture building need explicit encouragement and stewardship in order to reliably produce predictable, representative, beneficial outcomes.

To help organizations better harness the power of culture toward beneficial, aligned, intended ends, we represent culture building as a project that should be in the hands of a community manager. An organization needs a culture manager or steward who is resourced and empowered to apply the stages of project management to hone and amplify a community's latent commitments into a group with shared identity, goals, values, behavior, whose environment is supportive, and whose individuals are valued.

The mapping of culture work to community project management has strengths and weaknesses. Culture work is akin to project management because both are about deviating in a systematic planned way from the status quo. But it is different because a community manager has to be as much of a "reader" of the community's state as a "writer": maybe even more reader than writer. Culture building, more than other organizational projects, depends critically upon buy-in, and so requires building and maintaining broad consensus. Unlike most project management, a community manager's legitimacy and mandate will come from below, even if their formal authority is granted from above.

To structure our argument, and describe a community manager's culture building work, we frame our findings within the stages prescribed by project management scholarship. According to the Project Management Institute, and the general accepted practice of professional PMs, there are five phases of a project:

- initiating
- planning
- executing
- closing

- monitoring and controlling

We follow this with a discussion of the issues around recruiting a community manager. Although a premise of this work is that culture building should be explicit and systematic enough that anyone can do it, the informants in our corpus make it clear that there are specific qualities that a community manager should have (or cultivate) that will make them more effective in the role.

### **Observe (often called Initiate)**

At the beginning of this study, we expected a great diversity in how practitioners first approach an organization and learn the state and potential for its culture. This was reinforced by the diversity we observed during pre-interviews in the paradigms that practitioners were drawing from to motivate their practice, which variously included system dynamics, Bourdieu, and spiritual teachings. However, we found that the actual initial practices on entering a company's grounds show surprising consistency. In general outline, practitioners begin the observation stage by iteratively convening through person-to-person and group conversations with a diversity of stakeholders, representing well those lowest in the organizational hierarchy. Being outsiders to the organization, they tend to be well positioned to elicit honest reflections about the weaknesses of the organization's culture and its fit with members' goals, particularly in individual conversations. Following with group conversations creates an opportunity to surface themes and organically establish consistencies across accounts. The desired result of this iterative process will be a common understanding of the difference between what members of the organization broadly value as members of society, and what values the organization represents in practice. A practitioner with enough legitimacy, or facing a clear enough consensus, doesn't have to coax the sense out of everyone, they can just report their personal "sense of the room" and invite reflections. But legitimacy is a finite resource that is reduced when such assertiveness is off the mark.

One moving takeaway was how consistent interviewees were about seeking and surfacing the values and hopes of the lowest ranking employees that they talked to, even within traditionally hierarchical organizations. While we expected to hear that consultants would focus on onboarding employees into the leadership's desired culture, what we saw more of was consultants focusing on direct engagement with leaders about how the organization must change to align with what drives its employees. This bottom-up interest focus is an encouraging sign that emergent insights can in fact be facilitated by intentionality, leadership, and planning.

Practitioners were even consistent on seemingly minor details. They all used group conversations as a tool to make sense of individual diversity in values. These group conversations tended to be facilitated for increased focus and direction, and they tended to range in size from 8-15 people and last 1-3 hours, scaled so that every member of the group could make meaningful contributions to the conversation.

Where practitioner consultants differed, it tended to be in the specific prompts that they used to elicit values, common themes, and diagnoses of the organization's status quo.

Maybe facilitated group conversations will naturally and efficiently conclude with a consensus account of the organization's current and desired states. Converging on this account requires



extracting, negotiating, voicing, refining, decomposing, and ordering the many thoughts of others. And once they are established, closing the gap is most likely to involve changing the organization's practices to better reflect the members' goals.

Patterns from this stage suggest that a community manager should talk to many members one-on-one, develop their own personal sense of the landscape in the process, test, refine, and validate that sense in a group conversation, and then report a final set of high-level goals. The Observe stage will end with the community manager confidently and credibly announcing the membership's will for the project in terms of the difference between their needs and the organization's state. With that communication, the Planning stage can begin.

## **Planning**

The planning stage means taking some abstract differences between desired and actual values and making a plan to close the difference. Some examples of deltas:

- "Members don't feel like their voluntary contributions are being valued"
- "Members seem to care more about environmental sustainability than you would expect given that this isn't an environmental organization."
- "The community doesn't represent stated value X as well as other communities, but has incidentally become a hub for people who hold underrepresented value Y."

The community manager can generate a plan for each unaligned member value, cycling through the community for brainstorming, confirmation, or refinement. What actions can be taken to align an organization with its member values? It's not an easy question to answer, but, importantly, it is a more concrete question than "What actions can be taken to change this community's culture." For culture to change in an intentional way there has to be intentional, articulated action, as well as the resources and buy-in to support that plan.

It sounds misguided to try to plan emergent culture change, especially within the prosaic framework of project management. But making a mysterious, ineffable process less mysterious and ineffable can help more groups benefit from an intentional approach to culture.

## **Execute**

The planning stage should have developed realistic interventions, and established the concrete work of culture building.

In the normal corporate or organization setting, the agents deputized with a culture change process may be the community manager, other management, or the consultant practitioner. Regardless, the resources necessary to execute are nominally built into the position.

As in the other stages, there is a choice of how much to leave execution to the community manager or devolve execution to the community. The community manager can credibly claim to represent the community the more they follow a community approved plan toward community developed goals.

There is still a case to be made for involving the community in execution. Many practitioners in this study, after working with an organization to develop goals for its culture, implement those goals by delegating execution to teams in the organization. This accomplishes many things at once:

1. It is a rational way of dividing a complex task
2. It gives the largest number of members the experience that “how the organization is” is up to them.
3. By giving teams well defined tasks their chances of success increase, accelerating the bonding and trustbuilding functions of teamwork.
4. The work of improving an organization’s alignment concretely links a team member’s daily work and greater mission.

### **Closing/Monitoring/Renewal**

Each subproject of the culture building process will have its own natural close, perhaps coinciding with an overall close of the project, or with evaluations and monitors for assessing the effectiveness of each change. In normal project management closing is one step, and monitoring another. Although it makes sense for most project management, these distinctions are a bit less meaningful for culture change. There are a few reasons for this, but part of what makes a culture strong is the decision to engage with it actively as part of how the community runs.

More narrowly, some changes will either be ineffective, cause new problems, or bring new attention to existing problems that were missed. Some consultants reported returning monthly or quarterly, in one case for years, in order to check in with the implementers for updates, advice, accountability, and troubleshooting. Iterating on such second-stage findings improves the community’s ability to learn what works, and recognizing them plants the seeds for the next cycle of intentional culture building. Making attention to culture part of the system and process of the community is a big investment, but in embodying the value of adaptability, the willingness to do so is itself evidence of a strong organizational culture.

With a permanent community manager role iterating through cycles of development and refinement, the community is uniquely prepared to respond quickly when outside events—crashes, attacks, rifts, and other drama—intercede, putting a community in a position for these events to ultimately be remembered by the community as moments of growth and shared meaning, rather than regretful turning points and existential threats.

### **Recruitment**

The process outlined above is difficult because it requires building and maintaining trust with a large number of people who likely disagree with each other. Likely most people can succeed at this task with skilled guidance, but certainly the work favors skills that may not be present in all people.

So who should take this on? Can anyone do it? That question was an early motivator for this work. The answer has been, generally, yes. Effective culture change isn’t rare because only a few

people can do it, it's rare because it is difficult work involving unclear steps.

Still, some people are better at it than others. Our informal sense from the research is that the community manager should enjoy listening to others, be good at receiving feedback, and minimally charismatic. They should be seen as non-political in the community, should be capable of managing a project, and should probably believe in the value of strong culture. They must ultimately extract, distill, plan, execute, and monitor a will of the people without much distortion. They need to be a credible listener and impassive vehicle or container of the collective will.

The community manager may start with some of these skills by being a certain type of person, but most of it they will build by being a neutral active observer. Take a question like "*What are the ways that working for this company does or doesn't align with your values?*" A member's answer will obviously be different if the question came from their manager or an interested, sympathetic, neutral outsider. Fear of the former can easily undermine the honesty and bluntness of most people.

Some thinkers in our corpus have developed very granular models for who and how to recruit for culture change. *Great Mondays* author Levine shares a creative and intriguing taxonomy of how to decide the composition of a team on the basis of what part of culture building they are responsible for:

- For refining the community's shared purpose, Levine recommends assembling "*veterans, visionaries, and blockers,*" with exercises such as working together for three hours in a spacious area to write an obituary for their company.
- For reinforcing the connection between the community's higher purpose and daily activities, Levine recommends collecting *creative employees* around assignments such as drafting cues to implement and creating a record of the types of cues that creative employees find inspiring.
- For refining the community's shared values and beliefs: community members "*who feel representative of the company's ideal culture*" should gather around the prompt of their commonalities
- For developing initiatives that recognize and reward great contributors (and thus reinforce the values and beliefs they represent), Levine recommends "*employees who have been with the company for a comparatively long time*" for activities such as "Over the course of two hours, participants describe recognition as it currently exists and pick a value that it seeks to reward"
- For developing a shared sense of ideal shared behaviors, Levine proposes that the same "*Culture All-Stars*" from above brainstorm three types of behaviors: those that exist now and should stop, those that should continue, and new behaviors to strive for."
- For developing rituals that help behaviorally reinforce shared behaviors and bonds, Levine suggests *community members "of any tenure who are generally well-liked but not part of management"* to "understand the importance of rituals" and to identify what makes a ritual effective.

We have argued that aligning an organization with the values and goals of its members requires

intentional planning and execution, probably from a single person or group of people who have taken on the mission of leading the process. Selecting these community managers in a way that they earn and maintain their community's trust makes it possible to legitimately call their efforts emergent and bottom-up.

## **Discussion**

### **Culture and the meaning of life**

One early discovery from this work has been that practitioners see culture building work very differently from how it is perceived, in terms of slogans and superficial demonstrations of alignment. Across informants, an organization can only have strong culture if its members have a clear sense of what their lives mean, and they are a part of the organization because they feel that that organization is full of people who are pursuing the same meaning in the same way. In this kind of organization, the best way to maximize the meaning of one's life's work is within the aligned organization, and not as effectively with any other organization. Culture building practitioners from our study report a strong sense of mission because they see their work as teaching organizations to align their goals and processes with their employee's senses of meaning of life.

### **Consensus on nodes, not on links.**

As we were organizing this research, we anticipated organizing the results as a table with dimensions of culture as the columns (outputs) and common culture building practices/tools/levers as the rows/inputs. This result seemed promising at first, but it was regularly the case that what one informant saw as a result of culture, another saw as a cause of it, and the causal links they proposed for linkages rarely converged:

- A company puts effort into valuing its individuals and as a result its individuals feel valued,
- They continually refine their fit to their ideals and as a result they demonstrate continuous refinement,
- They share a common identity and as a result they gain a shared identity.
- Shared values and Adaptability are qualities of a good culture, except that Adaptability is also one of the values that a culture can share.

Under the mental model of author/informant Coyle, meaningful bonds among teammates causes shared identity, while under Vogl's, shared identity causes meaningful bonds. Vogl speaks of behavioral standards equally as a means and an end. Practitioners Perlov and Heskett independently identify vulnerability as the mechanism for trust, but Perlov follows recent schools of thought by making the feeling of psychological safety the central driver of cultural development, while Heskett is much more pluralistic in its sources and means.

What is the appropriate response to this inconsistency and circularity? Should we conclude that there are no conclusions, or forgive the relevant scholarship for harboring mutually causal factors operating in a complex system?

## **Studying culture building systematically**

Definitely answering these questions will require multiple methods, including quantitative studies of culture, that can compare across large numbers of organizations. Two types of social systems exist that would be ideal platforms for comparative studies, and possibly even experiments, on the practices and reproducibility of culture building. Franchises are businesses that come prepackaged and ready to run, and their homogeneity makes them ideal for studying culture building practices at scale (Watson et al. 2019; Oh, Yoo, and Lee 2019). Online communities are large in number and variety, permitting observational studies of existing diversity to proxy the effects of different approaches to culture building (Frey and Sumner 2019; Strimling and Frey 2020).

## **The internals, inputs, and outputs of “culture”**

Our informants, with very different philosophies and backgrounds, and united only by experience across organizations, have all independently developed their own understanding of the process of culture change. On what common threads have they converged? Four of the components of culture that we extracted from this process are shared identity, shared behaviors, shared purpose, and shared values. Are they distinct, or synonymous, or unfirm stand-ins for deeper unstateable patterns? Depending on context, some of these could be redundant (how independent are identity and values?), while some, being more mutable than others, may be seen less as results of culture building and more inputs to culture building (such as behaviors). Should these be combined, thinned, or broken down into even more qualities?

According to our analysis, one book distinguished all four as distinct concepts, four distinguished three of the four (all retained “values”), and five named just two of the four (Table 2). Although this leaves many gaps, and evidence that many authors collapse these concepts, their choices of which to keep and which to drop are surprisingly even, with each of those four dimensions identified as an important dimension of culture by 6 or 7 out of 11 authors (more than half). Our takeaway is that this method, using trade books to perform a comparative approach of consultant mental models, can credibly be used to identify shared concepts and identify common themes that experts agree on.

## **Conclusion**

### **Summary**

Is culture building an obscure art that only specially gifted individuals can perform? Or, lying under all the special approaches and paradigms and exercises, is there a set of activities that any organization can make their own with the right commitment, resources, and buy-in?

We reviewed the work and practices of professional consultants who have developed and articulated a systematic approach to culture building across organizations. We compare across them to distill the specific practices they use, and organize those practices into types.

Our conclusion is that, despite their vast differences, the community of culture building professionals does pursue common components of culture using common practices. We identify

bonding/trust and shared behavior, purpose, values/beliefs, and identity as five components of culture that can be targeted by over a dozen common levers identified by culture change practitioners. Given these consistencies, we propose that effective culture building, being rare, is probably rare because it is difficult and involved, not because it is inherently obscure. We conclude with an argument that organizations should understand culture building as akin to any other regular project-based initiative that organizations are built to pursue, and that organizations interested in an intentional and systematic approach to culture should devote community managers to iteratively extracting, refining, and aligning the “bottom-up” needs and aspirations of organization members with the practices and goals of the whole organization.

## **Limitations**

This summary should also make it clear how far culture building is from an engineering level of certainty. Under our analysis, the qualities with the strongest support as general dimensions were only identified by a maximum of 60% of sources. This could be due to the fundamental challenges of pursuing culture building, or to errors that may have been introduced during the research process. Limitations of our approach include:

- Our procedures for selecting books involved convenience and snowball sampling of relevant literature, both common sources of potential bias.
- Our procedures for building the prompts that undergrads filled out, for recruiting research assistants, for assigning books to research assistants, and for defining, filtering, and merging factors may have introduced similar biases.
- The books we selected may not accurately reflect the beliefs or practices of their authors. While we treat these books as sincere attempts by authors to describe their actual systems and opinions, it should also be acknowledged that they function in practice as marketing materials for each author’s consulting practice and may be describing what authors think readers want to hear, at the expense of faithful description of process.
- In one case, an author of one book in our sample was a coauthor of another book in the sample.
- Several research assistants struggled to comply with the instructions for completing simulated interviews, resulting in some low quality reports. This could have led to artificially low agreement in components or practices.
- Research assistants may have interpreted the simulated interview prompts differently, or with different levels of expansiveness, at the expense of reliability across readers.
- There was obvious subjectivity in our process for organizing data from the book reports into common features

To compensate for the inherent subjectivity of this analysis, and its potential sources of error, we make available the research materials involved in the conduct of this research, including several intermediate research products.

## **Method**

This research was based upon a novel “simulated interview” method in which research assistants simulated the process of interviewing informants with culture building practices by filling out a



semistructured interview prompts with quotes and summaries of books by those informants. These interviews were then consolidated, organized, and mapped to extract common themes in components of culture and practices for building it.

### **Pre-interviews**

We developed semistructured interview prompts for the simulated interviews by conducting five semistructured pre-interviews of professional consultants. These interviews provided background on the practice of culture building and helped us refine and iterate our research questions and approach. Our interviewees were compensated.

### **Literature selection**

We assembled a list of books by professional culture builders for comparison. We conducted a broad-based search for books about culture building in organizations, the criteria being that the author(s) work in/with organizations or communities to build culture as we define it, and have worked with enough organizations to have developed and published a general system. We developed the search list of books by drawing from leads out of our interviews, from recommendations by other personal contacts, by searching for both book titles and names of authors (often well-known consultants whose names have come up repeatedly), and online recommendations. The books we selected are in Table 1, and are drawn almost entirely from the popular (rather than academic) press, an appropriate outcome given our goals.

The rationale behind our method was to use books by domain experts as a model or approximation of the interview process, and thereby simulate interviews with the most experienced and well-regarded practitioners in the culture building space. We treat the system reported in each book as a reflection of the mental model that its authors have developed in the course of their careers.

### **Supporting systematic comparison**

We then assigned the books to volunteer research assistants along with a worksheet with the interview prompts. We developed the worksheet based on the picture that we gained from the pre-interview stage, by iterating on our interview prompts. The worksheet and raw reports are available in the collection of study materials. The interview encoded certain assumptions that we converged on after the pre-interviews, such as the guiding assumption that the systems reported by the books would be comparable to each other: that they describe “the same kind of work.”

We instructed research assistants to read the worksheet and continuously refer to it while reading. They were asked to stay close to the text in their answers (provide quotes), and to distill key concepts relating to each authors goals for an intervention (what qualities do they want the org to manifest) and approach (what tools or practices are they endorsing to help the org manifest those qualities)?

### **Systematic comparison**



After this we went through the reports in a subjective process of selecting keywords and themes that seemed to reflect each person's theory. This took the form of a qualitative mind mapping exercise based on creating, merging, splitting, and iteratively refining provisional categories from across reports.

## Materials

Materials from this study are available through the Zenodo data archive service at <https://doi.org/j3tb>.

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