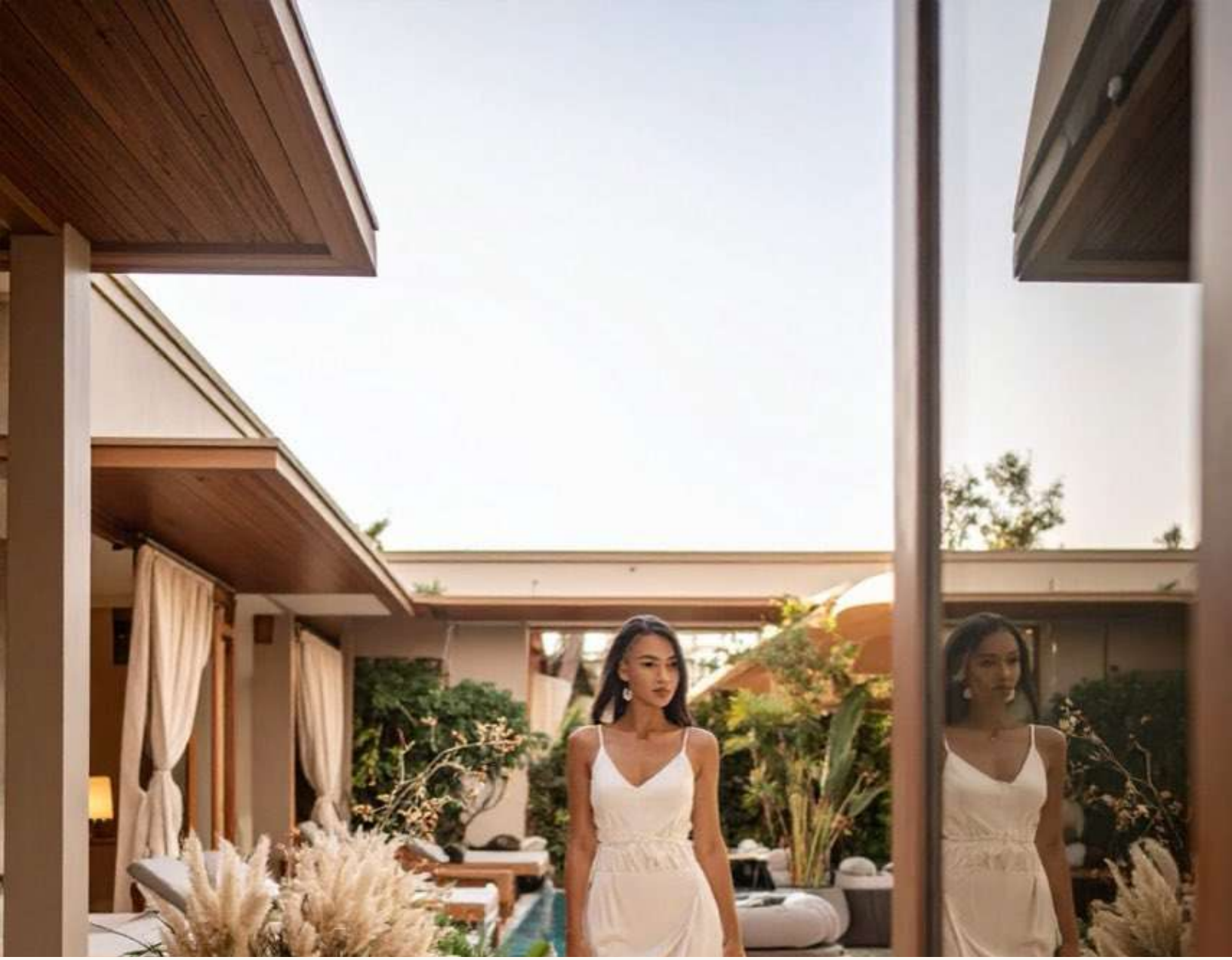


THE ECONOMY THAT KEEPS BECOMING · CHAPTER EIGHT

The Field Manual

Chapter Eight of The Economy That Keeps Becoming

Ammanuel Santa Anna

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THE LICENCE

The Field Manual
Chapter Eight of The Economy That Keeps Becoming

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A NOTE BEFORE YOU READ

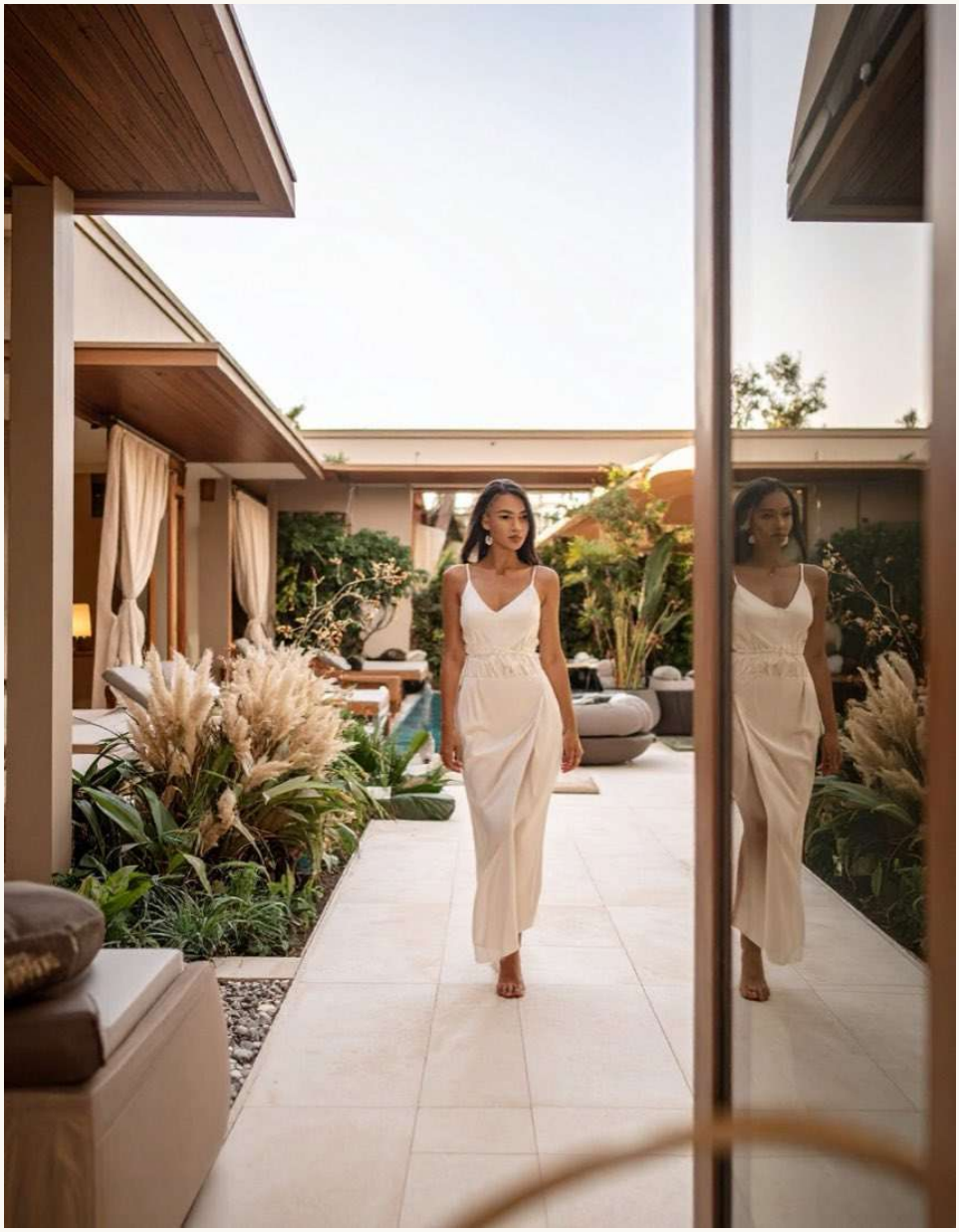
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ABSTRACT

The chapters before this one gave the ideas, the critiques, two public cases and one composite. This chapter gives the sequence. It is written so that a leader can run the whole practice in an organisation over twenty-six weeks, with named roles, a decision at each stage, and the mistakes most likely to occur, in the order they tend to occur. Twenty-six weeks is this book's recommendation, not a finding from research. It is long enough for two twelve-week probe cycles and short enough to fit inside a planning year. A small organisation can compress it; a large one may run it first in one division. The sequence matters more than the timing. The manual assumes an organisation of between twenty and a few thousand people. For a household, chapter 11 gives a shorter version of the same sequence.

CHAPTER EIGHT

The Field Manual



The Field Manual

HAUTE LUMIÈRE · THE ECONOMY THAT KEEPS BECOMING · CHAPTER EIGHT

What this chapter is for

The chapters before this one gave the ideas, the critiques, two public cases and one composite. This chapter gives the sequence. It is written so that a leader can run the whole practice in an organisation over twenty-six weeks, with named roles, a decision at each stage, and the mistakes most likely to occur, in the order they tend to occur.

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The roles

Five roles, which in a small organisation may be held by three people and in a large one by a small team for each.

The sponsor. The person with authority over the system being examined, usually the chief executive or the head of the division. The sponsor's job is not to run the practice but to protect it: to give it time, to read its findings unedited, and to make the decisions it brings forward. A sponsor who delegates the reading of the findings has turned the practice into a report, and a report is the thing chapter 12 warns against: feedback routed to one person rather than to the people who act.

The steward. The person who runs the practice week to week. The steward keeps the pages (the maps, tests, audits and ledgers), convenes the sessions, and holds the predictions so that nobody can rewrite them later. The steward should be trusted across the organisation, curious, and senior enough to be heard, but need not be an executive. In Larkfield, the composite of chapter 7, this role might be held by the head of support.

The mapping group. Five to nine people drawn from different parts of the organisation and different levels of it, chosen because between them they see most of how the system actually works. At least two should be people whose daily work puts them in direct contact with customers, suppliers or the physical operation. The group meets for the mapping sessions and for the reviews.

The probe owners. One person for each probe, who designs it with the steward, runs it, records what happens and brings the result to the review. A probe owner should be the person closest to the work the probe touches.

The second reader. One person, or a small rotating group, whose job is to read the findings and try to falsify them. This is the role most often omitted and the one that most protects the practice from its own en-

thusiasm. The second reader asks of every claimed loop: what is the evidence it is running? Of every claimed lock-in: has it been priced? Of every probe result: was the prediction written before or after?



Before week one: three decisions

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Before week one: three decisions

The sponsor makes three decisions before anything begins.

Which system. The whole organisation, a division, a product line or a single process. The smaller the system, the faster the first cycle; the larger, the more likely the most important loops are inside it. A reasonable rule: choose the smallest system that contains the decision currently on the sponsor's desk.

Which question. The practice works best with a real decision in view. "Should we enter this market?" "Why has retention fallen?" "What should we do about this ageing system?" A practice with no question tends to produce a beautiful map and no change.

What will be shared, and with whom. The mapping will surface things that are uncomfortable: arrangements a past leader chose, loops that carry extraction, places where information is held back. Decide in advance that the maps will be read by everyone in the mapping group, that the findings will be shared with the people who work in the loops they describe, and that nobody will be blamed for what history chose. Chapter 4's argument about emergence without a villain is the governing principle here: if the map becomes a way of finding someone to blame, people will stop telling the truth to it.

Weeks 1 to 2: the first map

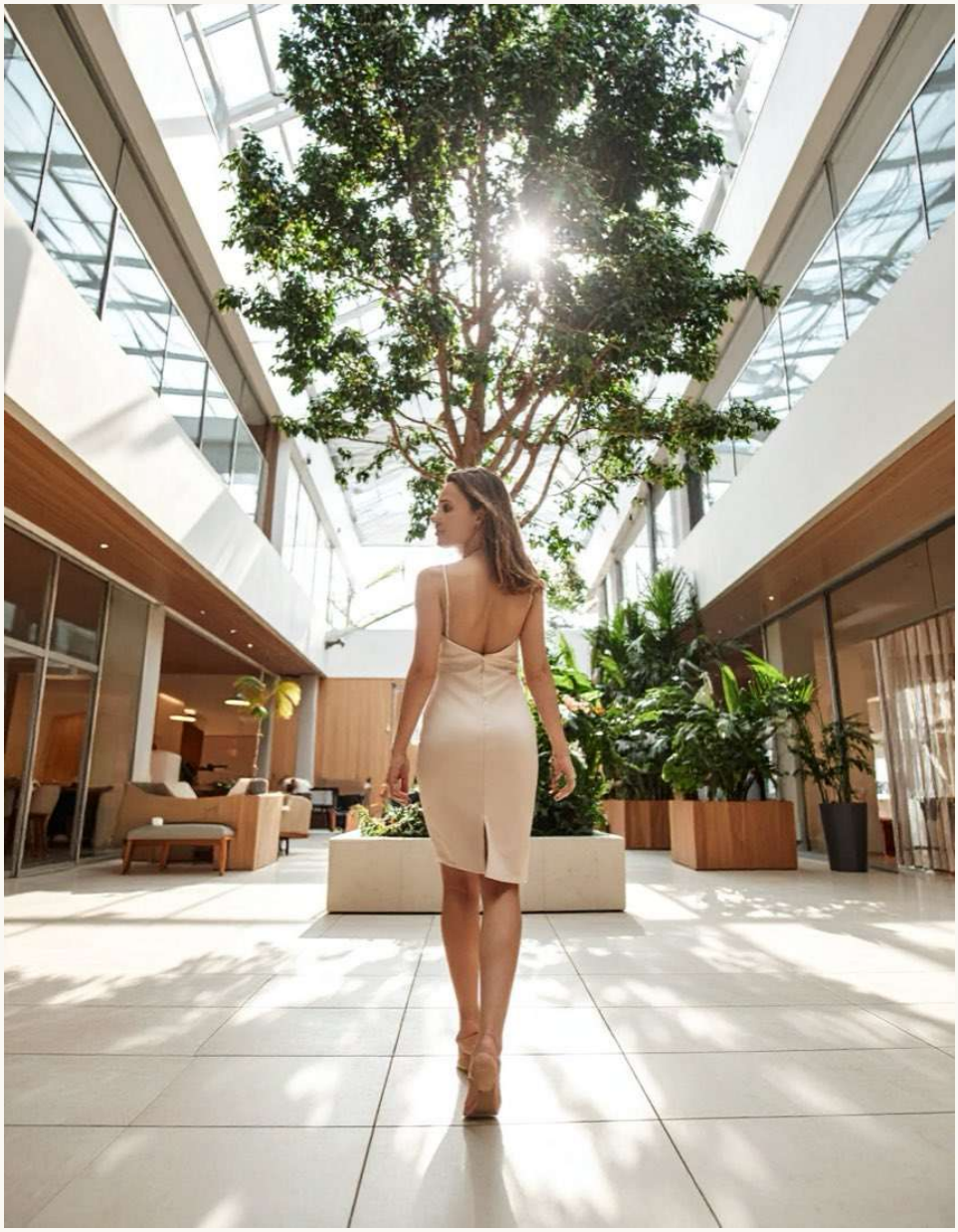
What happens. The steward and the mapping group fill in the First Map of Loops from chapter 2. They begin alone, each person writing their own map in pencil for one hour, and then meet for half a day to compare.

The finer points.

- Begin alone. If the group maps together from the start, the most senior or most confident voice will set the shape and the others will fill it in. Separate maps, compared, show where people see the system differently, and those differences are often the most useful finding of the first fortnight.
- Write every loop as a sentence: *the more A, the more B, the more A*. A loop that cannot be written this way is usually a list of things that are related, not a loop.
- For each reinforcing loop, ask for one piece of evidence that it is running: a figure, with its source. Loops without evidence are hypotheses; mark them with a question mark, as the founder in chapter 7 did with her hiring loop.
- Limit the first map to five reinforcing loops, five lock-ins and three balancing loops. The temptation to map everything is strong and the result is a diagram nobody uses.

The decision at the end of week 2. The sponsor reads the combined map and chooses: one reinforcing loop to audit, and up to three suspected lock-ins to test. The choice should favour the loops closest to the question on the desk.

The mistake to catch. A map that describes the organisation as its leaders wish it were. The second reader's question for week 2 is: which of these loops would the people at the working level recognise? If the answer is "few", the map needs another session with them in the room.



Weeks 3 to 4: the lock-in tests

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Weeks 3 to 4: the lock-in tests

What happens. For each suspected lock-in, the steward and the relevant probe owner complete the Lock-In Test from chapter 3: the arrangement, the alternative, the grade of evidence, the price of switching and the loops holding it in place.

The finer points.

- Grade the evidence honestly. One anecdote, several anecdotes, a measured comparison, several measured comparisons. Most suspected lock-ins rest on anecdotes. That is not a reason to ignore them; it is a reason to probe rather than switch.
- Price the switch in four currencies: money, time, relearning and lost compatibility with others. The last is the one most often missed, because it falls on people outside the room: customers who would have to change their habits, partners whose systems connect to yours.
- Name who would disagree with switching, and write their best argument. If nobody can state it, the test is not finished.

The decision at the end of week 4. For each arrangement, one of three verdicts. *A habit*: move it now, because it costs little, and because a habit moved is evidence to everyone that the organisation can move. *Switch*: the evidence is strong and the switch is cheap; name an owner and a date. *A true lock-in*: the evidence is strong and the switch is costly; it goes forward to the probe stage, and the loops holding it are named so that two can be changed together.

The mistake to catch. Funding a large rebuild of a true lock-in at this stage. Chapter 7's composite firm faced this choice with its old integration and took the slower route. The living-systems reading suggests redirecting the loops that feed a lock-in before replacing the arrangement itself.



Weeks 5 to 6: the loop audit

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Weeks 5 to 6: the loop audit

What happens. The steward and the mapping group complete the Loop Audit from chapter 4 on the reinforcing loop the sponsor chose: who acts in it, who receives the consequence, how long the consequence takes to arrive, and whether the person acting ever sees it.

The finer points.

- Go and ask. The audit cannot be completed from a desk. For each loop, at least two people who act in it should be asked, in their own words, what they know about its consequences. In Larkfield, the engineers did not know which features clinic managers valued; the only way to learn this was to ask both.
- Distinguish severed loops from slow ones. A loop in which the consequence arrives after a year is not severed, but it is too slow to steer by. A loop in which the consequence never reaches the actor is severed. The repairs differ: a slow loop needs a faster proxy; a severed loop needs a new route.
- Find the virtuous cycles already alive. The Luminous 100's reading of systems thinking asks this directly, and it is the half of the audit most often skipped. A loop that is already generating trust or learning is usually cheaper to feed than a broken loop is to repair.

The decision at the end of week 6. The sponsor chooses one severed loop to suture during the first probe cycle, and the route by which the consequence will travel back. The route must end with the people who act, not with a manager.

The mistake to catch. Repairing the loop by sending the information to the leadership team. Chapter 12 names this as one of the three common mistakes of the first month: a new dashboard on the leadership agenda restores the loop for the people at that table and leaves it severed for everyone else.

Weeks 7 to 8: designing the probes

What happens. The steward and the probe owners design two or three probes, using section 5 of the Loop Ledger from chapter 7. Each probe is small, safe and informative. Each has a prediction written before it begins and a stop condition agreed in advance.

The finer points.

- *Small* means it can be run within existing budgets and authority, or close to them. *Safe* means that if it fails, nothing important is damaged and nobody is harmed. *Informative* means that whichever way it comes out, the organisation learns something it did not know.
- Write the prediction as a number where possible, with a baseline. "At least six new small clinics in twelve weeks, against two in the same period last year" is a prediction. "Increased interest from small clinics" is not.
- Write the stop condition as a trigger, not a judgement. "If advance cash falls by more than five per cent" is a trigger. "If it isn't working" is a judgement, and judgements made mid-probe tend to favour continuing.
- Ask the El Farol question of each probe. If competitors or partners noticed and responded, what would they do, and would it change the result?

- Include at least one probe that tests the suture chosen in week 6. Restoring a feedback loop is itself an intervention whose effect should be predicted and watched.

The decision at the end of week 8. The sponsor approves the probes, their predictions and their stop conditions, and signs the sheet. The steward keeps the signed copy. Nobody, including the sponsor, may change a prediction after this point.

The mistake to catch. A pilot disguised as a probe. Chapter 12 gives the test: if the team cannot say in advance what result would make it stop, it is running a pilot.

Weeks 9 to 20: the first cycle

What happens. Twelve weeks of running the probes. The steward convenes the probe owners for thirty minutes every fortnight; the mapping group meets once, at week 15, to review the map in the light of what the probes are showing.

The finer points.

- Record what happens weekly, in the probe owner's words, before anyone summarises it. Summaries made later tend to fit the outcome.
- Watch for stop conditions and act on them when they are met. A probe stopped on its trigger is a success of the practice, not a failure of the probe.
- Keep the suture running and visible. If the consequence that was supposed to travel back to the people acting stops arriving, find out why within a week. Restored loops tend to decay unless someone tends them.
- Use the Monday Sheet from chapter 12 as the steward's weekly page.

The decision at week 15. The mapping group reviews the map. Have any loops appeared that were not on it? Has any lock-in turned out to be a habit? The sponsor may add one new probe at this point if the review shows a gap, but may not change the existing ones.

The mistake to catch. Probe drift: the gradual expansion of a probe's scope as it begins to succeed, until it is no longer small or safe and its result can no longer be read against its prediction. If a probe is succeeding, let it finish, then amplify it in the next cycle.

Weeks 21 to 22: reading the results

What happens. Each probe owner brings the result to a half-day review with the sponsor, the steward, the mapping group and the second reader. Section 6 of the Loop Ledger is completed: predicted, happened, and a verdict of amplify, adjust or stop.

The finer points.

- Read the predictions aloud before reading the results. This is the single most protective habit in the practice, because it makes rewriting history visible.
- Let the second reader speak before the sponsor. The second reader's task is to find the reasons the result might not mean what it seems to: a confounding event, a selection effect, a measure that moved because people knew it was being watched. Chapter 9 gives the questions.
- Ask what the system showed that the week-one map did not. This is often the most valuable line of the whole review.

The decision at the end of week 22. For each probe: *amplify* (extend it, with a new prediction, in the second cycle), *adjust* (change it and run it again) or *stop* (record what was learned and end it). And one decision about the map: what must be redrawn?

The mistake to catch. Treating a probe that failed clearly as a waste. A clear failure, read honestly, often tells the organisation more than a modest success.



Weeks 23 to 26: the second map, and the decision on the desk

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Weeks 23 to 26: the second map, and the decision on the desk

What happens. The mapping group redraws the First Map of Loops with what the first cycle taught. The sponsor takes the question that began the practice, the decision on the desk, and decides it, with the map, the tests, the audit and the probe results in front of them.

The finer points.

- Compare the second map with the first. The differences are a record of what the organisation learned about itself, and they should be kept. A year of maps, read in order, is the most honest account an organisation has of how it actually changed.
- Write the decision with the reasoning, including the El Farol reasoning: what others are likely to do, and where that leaves room.
- Set the date for the next cycle. The practice is meant to recur. A second cycle runs faster than the first, because the map exists and the habits have begun.

The decision at the end of week 26. The decision on the desk, and the date of the next cycle.



The rhythm, on one page

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The rhythm, on one page

WEEKS	STAGE	WHO	OUTPUT	THE DECISION
0	Set-up	Sponsor	System, question, sharing rule	Three set-up decisions
1–2	First map	Steward, mapping group	First Map of Loops	Which loop to audit; which lock-ins to test
3–4		Steward, probe owners	Lock-In Tests	Habit / switch / true lock-in

WEEKS	STAGE	WHO	OUTPUT	THE DECISION
	Lock-in tests			
5–6	Loop audit	Steward, mapping group	Loop Audit	Which loop to suture, by what route
7–8	Probe design	Steward, probe owners	Probes with predictions	Approve and sign
9–20	First cycle	Probe owners, steward	Weekly records; Monday Sheets	Week 15: one probe may be added
21–22	Reading	All, second reader first	Loop Ledger section 6	Amplify / adjust / stop
23–26	Second map	Mapping group, sponsor	Second map; decision	The decision on the desk; next cycle

Time and cost, honestly

The practice costs time, and it is fair to say how much. In a firm of about sixty people, as in the composite of chapter 7, a reasonable estimate is two half-day sessions for the mapping group, about a day of the steward's time each week through the first eight weeks and half a day a week thereafter, and whatever the probes themselves cost, which by design should be small. These are this book's estimates, not measurements from a study, and a larger organisation will need more.

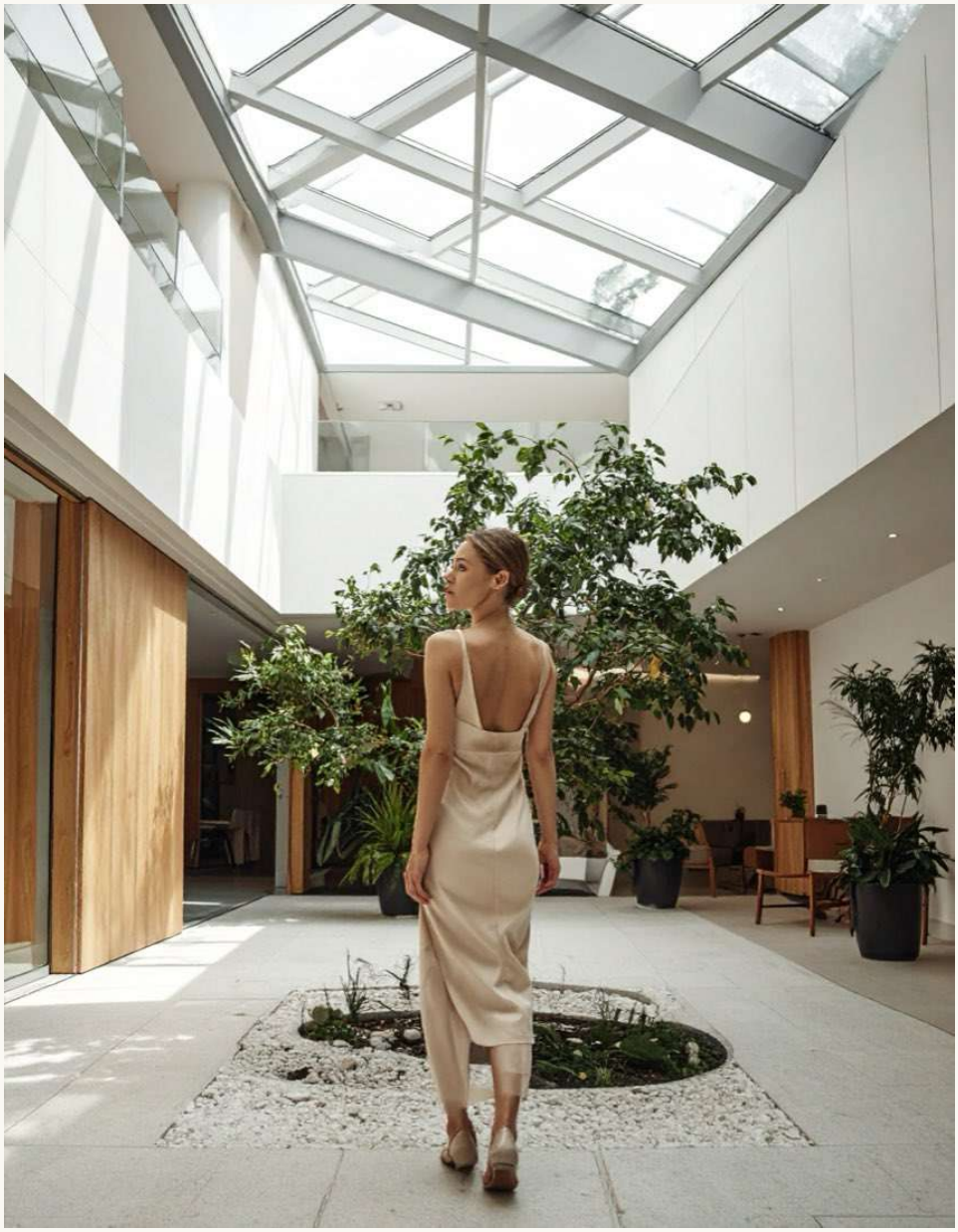
The usual objection is that leaders do not have the time. Two observations answer it, though neither settles it. The first is that most of the time spent is spent on the decision that was already on the desk; the practice changes how that time is used more than it adds to it. The second is that the costliest mistakes in most organisations, the large rebuild of a lock-in that should have been loosened slowly, the market entry that every competitor made at once, the loop that decayed for a year before anyone noticed, cost far more than a quarter's attention.

Scaling up and down

In a small organisation (under twenty people), the sponsor and steward may be the same person, the mapping group may be everyone, and the cycle may be eight weeks rather than twelve. Keep the second reader; in a small organisation it may be someone outside it, a trusted peer or adviser.

In a large organisation, run the practice first in one division with a real decision in view. Resist the temptation to launch it everywhere at once; a practice launched as a programme tends to become a reporting requirement. Let the second division ask for it after seeing the first.

In a network of organisations (a supply chain, an association, a cluster of firms like those in chapters 5 and 6), the sponsor role is usually shared, and the mapping group should include people from several organisations. The Cluster Reading from chapter 5 and the Shock Rehearsal from chapter 6 are the natural starting tools.



A word about the people in the loops

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A word about the people in the loops

Santa Anna's book warns that the transition from hierarchy to distributed authority is developmental rather than structural, and the warning applies here. Restoring feedback to people who have not been given it before can be uncomfortable for them. They may not trust it at first, may not know what to do with it, or may hear it as blame. The practice should be introduced to them before it begins, with the sharing rule stated plainly, and the first feedback they receive should, where possible, include something that is working. The Luminous 100's reading of appreciative inquiry, and the habit of looking first for the virtuous cycles already alive, are the practical form of this care.

The Tool: The Twenty-Six Week Plan

The whole field manual on one page, to be filled in by the steward at week 0 and kept beside the Monday Sheet.

Set-up (week 0)

System:

Question on the desk:

Sponsor: · Steward: · Second reader:

Mapping group (five to nine names, at least two close to the work):

Sharing rule, in one sentence:

Weeks 1–2 · First map

Dates of individual mapping and of the comparison session:

Loop chosen for audit:

Lock-ins chosen for testing (up to three):

Weeks 3–4 · Lock-in tests

ARRANGEMENT	EVIDENCE GRADE	SWITCHING COST	VERDICT	OWNER, DATE

Weeks 5–6 · Loop audit

Severed loop to suture:

Route the consequence will travel, ending with:

Weeks 7–8 · Probes (signed by sponsor on)

PROBE	OWNER	PREDICTION, WITH BASELINE	STOP TRIGGER	EL FAROL NOTE

Weeks 9–20 · First cycle

Fortnightly review dates:

Week 15 map review date:

Weeks 21–22 · Reading

Review date:

- Predictions read aloud first: yes / no

Second reader's three strongest objections:

Weeks 23–26 · Second map and decision

What the second map shows that the first did not:

The decision on the desk:

Date of the next cycle:

A note on method

The roles, timings and sequence in this chapter are this book's recommendations, developed from the instruments of chapters 2 to 7 and the composite of chapter 7. They are not the findings of a controlled study, and the time estimates are illustrative. The warning about developmental transition paraphrases Santa Anna, A., *Ecstatic Economics* (Luminous Prosperity, 2026), chapter 4 ("The Vitality-Centered Workplace", on self-management and distributed authority), quoted in part in chapter 4 of this book.

The Field Manual

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