

White Paper

Systems Leadership and Platforms

How to mobilize people to transform systems and build the platforms to scale these efforts

November 2018



Systems Leadership and Platforms: How to mobilize people to transform systems and build the platforms to scale these efforts

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¹ This paper brings together the discussions and work that our Global Future Council has pursued over the past two years. We are grateful for the contributions of all of the members of this Council.

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Overview

The Fourth Industrial Revolution creates global connectivity, making it possible to bring together the right people with the necessary resources to solve problems and address opportunities in ways that would have been unimaginable just a few decades ago. This can be helpful in addressing the significant global challenges that remain for humanity, not to mention the enormous opportunities ahead.

To grasp this potential and avoid the pitfalls, we need systems leadership. We need leaders who can effectively mobilize a large number of diverse and independent institutions and networks, both globally and locally, with the specific intention of transforming existing systems. We will also need to find ways to design and deploy new forms of platforms to exploit the efforts of systems leaders and make it easier to marshal a growing number of diverse participants.

This paper will explore some of the leadership and platform-design principles required. It features examples of systems leaders who are already working in this way as well as the thoughts of leading designers who are exploring new kinds of platforms. In our discussions with people, whether in social change organizations or corporations, there is a great deal of confusion and uncertainty about what systems leadership means. Our intention is not to provide definitive definitions, but to offer food for thought and action and contribute to a growing conversation about what works – and what does not.

Systems leadership – the challenge

We have always lived in a world shaped by complex and evolving systems, consisting of many participants that interact with each other in rich and ever-changing ways. Such systems range from the ecosystem of a forest uninhabited by people to the increasingly dense cities that are home to a growing share of the global population. The growing connectivity enabled by the Fourth Industrial Revolution means that systems are scaling and evolving at an unprecedented rate. Systems that were once relatively independent are becoming increasingly interconnected and interdependent, which makes it harder and harder to discern the boundaries between one system and another. All of this leads to increasing volatility, uncertainty, complexity and ambiguity, making it more challenging for leaders to achieve the impact they intended. Too often, we seek to reduce systems to component parts so that we can better understand and manage each system, obscuring our ability to comprehend and work across the system as a whole. Overwhelmed by the speed and complexity of the systems that surround us, we are spending too much time in passive or reactive mindsets. The question we explore in this paper is how do we change that.

Systems leadership – the opportunity

To achieve significant and lasting change in a more connected world, anyone seeking to address the biggest challenges and opportunities created by the Fourth Industrial Revolution will have to recognize that it is impossible to have the desired impact while remaining within the confines of their particular institutions or communities, or the other systems that surround them today. They will need to connect with and mobilize a growing number of participants from diverse institutions and networks around the world, weaving together a new system of collaboration that is explicitly intended to enable transformation and change. For ease of reference, we will refer to these as intentional systems – those brought into being with the express intention of bringing people together to create change – to differentiate them from the multiple systems (such as the cities and business networks) that already exist.

In thinking about transforming systems, two broad options are available. There is a “top-down” approach such as Crisis Action, where the focus is on mobilizing the leadership of institutions and networks to join forces and resources. Another option is to pursue a “bottom-up” approach like the civil rights movement in the United States, which focuses on connecting individual participants from within institutions and communities to come together and collaborate in addressing significant problems and opportunities. In this latter approach, the intentional system consists initially of individuals who may, over time, convince the leaders of various institutions and communities to join the effort.

These are not “either/or” options – in fact, most successful systems leadership initiatives seem to have elements of both as they evolve their intentional systems. Two such examples of hybrid approaches are the Maker Movement and the Code for America movement. Our focus in this paper will be primarily on the “top-down” approach, but we encourage systems leaders to actively explore both options as they seek to scale their initiatives. The broad principles that we outline below apply to both approaches.

People who are effective at transforming existing systems are adept at weaving together what we call an *intentional system* – that is, a model for organizing people and resources in a way that brings about change in the system as a whole. Put simply, an intentional system of collaboration is created with the aim of changing any existing system(s) as a whole. Often, a broad range of narrow initiatives will already be under way, and there needs to be a way to pull these initiatives together to more effectively connect and amplify efforts that were previously isolated – as well as likely launching additional initiatives to address unmet needs.

For example, Health Care Without Harm used a systems approach to understand how to get the healthcare sector to lead the effort towards a low-carbon and toxin-free future. Or, as Gary Cohen, the founder of Health Care Without Harm, puts it – towards planetary wellness. As he explained, healthcare itself is an industrial enterprise – a system in its own right – that represents all of the contradictions of an economy built on fossil fuels, toxic chemicals and industrial agriculture. So the inputs for industrialized healthcare go against the mission to do no harm; they are actually contributing to disease. The opportunity lies in the fact that it is a sector with enormous power; in the US it constitutes 18% of the entire economy, and it is the largest employer and significant buyer of all sorts of goods and services. Gary Cohen and his team recognized that if they could use that power to ensure the inputs into the healthcare systems were not harmful, they could enable the type of transformation towards a low-carbon and toxin-free future required. In their first ten years, they eliminated the market for mercury-measuring devices (such as thermometers) in the US by working directly with doctors, using shareholder advocacy, economic arguments and PR opportunities. They went on to work with the World Health Organization in an international effort to secure a global treaty to phase out mercury completely from healthcare around the world by 2020.

In this way, they used the healthcare system to influence and transform the even-bigger systems of industry and the environment with which healthcare is interconnected. And they did this by creating an intentional system: a network of 12,000 healthcare professionals and institutional partners across 50 countries, bringing together numerous initiatives that would otherwise have operated alone. We will be publishing our interview with Gary Cohen, which goes into the details of their strategy and exactly how they went about it, separately.

These intentional systems require intent and action to take root – and a specific form of leadership tailored to stimulating, nurturing and scaling the web of relationships and interactions needed. At the outset, it is important to stress that systems leadership is not an individual pursuit. It is a rejection of old notions of top-down hierarchical leadership and is in its very essence a collaborative, collective pursuit. When we talk of “systems leaders”, we most often mean people leading together, not alone. It is far from a solitary pursuit and instead is one of stewardship, enabling and inspiring versus command and control. The intentional systems required to drive change are constantly evolving. These systems can be influenced and shaped, but they certainly are not amenable to conventional command-and-control techniques.

So what are the key elements required for this type of systems leadership?

Focus

In a complex and evolving world, a major challenge is to define a long-term focus that is ambitious yet achievable. Systems leaders say that such focus is essential in honing in on what matters most and will bring about the deepest and most lasting transformation over time.

Define a long-term focus. Systems leaders need to be able to pull people out of the short-term pressures that keep them too narrowly focused on incremental efforts and narrowly defined success and increase their willingness to pursue longer-term and more fundamental initiatives. Equally importantly, they need to craft a compelling opportunity that can pull people together based on the recognition that they will all benefit by addressing that opportunity. They can do this through two approaches:

- **Communicate a powerful shared vision.** Successful systems leaders are able to articulate a shared vision of a long-term opportunity that is both inspiring and achievable. This vision will frame the outcomes that the change efforts seek to achieve, but it must go beyond facts and figures and tap into the core emotions that motivate people to participate and invest an increasing amount of time and effort. These shared visions need to be grounded in a deep understanding of the forces shaping our global economy and local communities so that not only are they achievable, but they can also draw on the broader forces at work. The vision must be specific enough that it is both credible and inspiring, and can help to focus and prioritize near-term initiatives, but not be so detailed that it leaves no room for improvisation and innovation. As Gary Cohen reflected: “Our approach towards the healthcare sector has been, we aren’t blaming you for any of this – you didn’t know about a lot of the issues that you know about now. So, now you do know, we are bringing this new science to you so that you have a new opportunity to make change.”
- **Frame powerful questions.** Successful systems leaders are not afraid to pose questions. In fact, they see questions as a powerful way to mobilize people to work and learn together. These questions can take many different forms – for instance, “What would it take to . . . ?” or “What might it look like if . . . ?” – but the crucial point is that such questions focus people on the opportunity to change the game in a fundamental way by trying new approaches and practices. More fundamentally, they communicate that it is not only OK but expected that questions will be asked, rather than assuming we already have all the answers. These questions also break down traditional hierarchies and invite everyone to take the initiative in exploring and finding potential answers.

Acknowledge the obstacles and barriers along the way. There is often a temptation to frame the opportunity as inevitable. That’s a mistake. If it’s inevitable, why would anyone invest the time and effort to participate? Effective systems leaders adopt an appropriate balance between framing an opportunity and recognizing that there are significant obstacles and barriers to be overcome. This brings people out of their comfort zone and motivates them to come together to help make the opportunity become a reality. At some level, they have to believe that their participation is necessary to tilt the odds towards success. It also prepares people for the possibility of failure and frustration along the way. On the other side, it frames an exhilarating challenge – can you help us find the new approaches that will bring about the transformation you seek?

Define the values that will provide the guardrails. In seeking to achieve change, all kinds of actions might be possible. Like any community, efforts to shape an intentional system will thrive only if there is a clear understanding of what constitutes acceptable action. This is a critical dimension of focus – helping everyone to be clear about what not to do. Systems leaders must be prepared to get rid of “bad apples”. There will likely be participants who are toxic to either the values or the effectiveness of the change initiative (for reasons that may range from failing to deliver to free-riding or taking undue credit).

Target key systems leverage points. Wherever possible, the important thing is to achieve the greatest possible impact with the least amount of effort. Successful systems leaders always search for the so-called “leverage points” in the systems they are trying to change – the particular elements that play a disproportionate role in shaping the evolution of the overall system. This requires a deep understanding of systems dynamics, looking at systems holistically while resisting the temptation to become overly analytical and break the system down into its component parts. It’s not about the parts but about the interactions across the parts, and how those might be evolving over time. Tim Brown from IDEO describes a new approach called “intervention design” that seeks to pick the places where design can be most effective in shaping a system in positive ways. Clearly, if one can identify and target these leverage points, it becomes possible to shift systems dynamics in ways that will achieve certain outcomes more quickly and with less effort than more isolated approaches. Even the most complex systems can be shaped by effectively targeting the leverage points that set in motion much broader change. For example, some architects are discovering that small design interventions in urban facilities such as the implementation of pedestrian- and bike-friendly amenities can significantly alter the evolution of broader urban systems. Tim Hanstad, a co-founder of Landesa, an organization that focuses on the problem of insecure land rights globally, indicates that a key to their early success was their decision to find and connect with the right government decision-makers who had the greatest ability to influence public and policy and could help to unlock change in terms of implementing laws to increase security of land ownership.

Leverage

Most of the world's resources are focused on sustaining the systems that already exist. We need to break free of that mindset and resource model if we are going to make the enormous shifts required. And the key to success will be optimizing the time, efforts and resources of a large number of diverse participants.

Define the intentional system that will need to be mobilized. Systems leadership requires a thoughtful understanding of the full range of participants that will need to be mobilized to address the opportunity they have identified. Since we are focused on global opportunities that will require significant changes being made to existing systems, it is likely that these participants will need to come together across a large number of independent institutions and more informal networks, forming a system of complex interactions of their own. Successful systems leaders invest the time required to identify the types of participants likely to be necessary and that can help to accelerate progress towards the change sought. For example, Landesa's Tim Hanstad indicated that focusing on mobilizing a broader range of participants from movements such as women's economic empowerment as well as for-profit businesses was key to achieving greater impact in strengthening land rights policies. Systems leaders will also invest the time to understand the kinds of interactions that will help these participants to build on each other's efforts and the complex interdependencies that are likely to evolve over time. It will be even more challenging to develop an understanding of how the interactions within the new intentional system will connect and evolve with the growing range of systems already in place, which will be the target for change.

Understand motivations. Systems leaders will not be able to mobilize the resources they need without clearly understanding the motivations of the diverse participants they are seeking to engage. Too often, initiatives are framed in terms of how the world will benefit or how certain disadvantaged groups might benefit, but it is also essential to understand how different participants see the problem differently (even if they agree it is one that demands to be addressed) and are motivated by different values, which must also be appealed to directly. It is also the case that the various participants themselves might benefit by bringing about the change envisioned. As systems leaders think about how participants might benefit, they should move beyond narrow cost/benefit analyses and speak to the broader emotional needs of the participants. What are their greatest aspirations? What are their most deeply held fears? Which of their deep-seated values are stirred by this threat or opportunity? The most powerful systems leadership initiatives are those that strengthen hope and diminish fear and do so across groups that would naturally be polarized. Systems leaders understand that they cannot dictate action. Instead, they must encourage and facilitate interaction by gaining a deep understanding of the contexts and aspirations of the participants.

Encourage local initiatives. Systems leadership is ultimately about balance. On the one hand, there is a need to effectively focus participants on a shared outcome (as described earlier) and, on the other hand, there is a need for lots of diverse local efforts to discover the actions that work. This is not a top-down effort with detailed blueprints cascading down a hierarchy. This is much more of a horizontal form of mobilization, shaped by the outcomes sought, but driven by a growing number of local initiatives that evolve rapidly over time. Systems leaders will need to find ways to empower people to think and act innovatively at every level of the intentional system. Some of these methods, such as an emphasis on learning, are suggested below.

Encourage the formation of local groups. Local initiatives can certainly be driven by individuals. However, they are likely to have much greater impact if they are shaped and driven by small groups, typically of 5–15 people, who come together on a sustained basis to form deep, trust-based relationships with each other. These small work groups can challenge each other, hold one another accountable and provide support and reinforcement for each other when the participants inevitably run into obstacles. The Maker Movement, a broad-based initiative to help people harness new forms of technology to express their creativity in designing and making physical products, has actively encouraged the formation of local maker communities that work together in shared facilities. The focus of these local groups is to learn by doing and to learn faster together. As Dale Dougherty, a key leader of this movement, observed: "Building community was as important as any of the tools for building things that the makerspace offered." He also indicates that the leaders of local "makerspaces" understand how to "get out of the way" and encourage distributed control and decision-making.

Seek and celebrate early wins. These distributed initiatives are most likely to be sustained if they can focus initially on goals that can be achieved relatively quickly. The ability to have a swift impact with relatively modest effort provides strong reinforcement to the participants that these efforts are worth pursuing and motivates them to seek even more challenging goals. Systems leadership can be very helpful in encouraging these local groups to start small, but with the recognition that they have the potential to achieve far more over time. Systems leaders must be cheerleaders for early wins as this immediate recognition is an important source of inspiration for both those who have succeeded and those who then realize it is possible. Tim Hanstad indicates that they always seek early wins so that participants can begin to take credit for the impact and be motivated to seek even greater results.

Connect for impact. The key to scaling these distributed groups is to provide a broader network that can connect the groups and give them access to a broader set of resources and expertise over time. This means they can seek help when needed and also find encouragement and renewed energy when the going gets tough. Another key function of this network is to share stories about the early efforts of these local groups and the impact they were

able to achieve. Such stories help to inspire and motivate other groups to take action and raise the bar in terms of the impact they are trying to achieve. As we will see below, platforms can play a significant role in cultivating and evolving these networks. Dale Dougherty has been very active in encouraging the organization of Maker Faires around the world, which bring people together from makerspaces and provide them with an opportunity to share stories of their success as well as to seek new ideas for generating even more creative designs.

Learning

Systems leaders seeking to drive change will be engaging with complex and rapidly evolving systems with significant interdependencies. The key to success will be to learn through action. Systems leaders seek to learn what works and what doesn't as rapidly as possible and to quickly evolve their initiatives to have even greater impact. This is also fundamental to empowering local groups and adopting an ethic of service rather than hierarchical control.

Jennifer Pahlka, the leader of Code for America, a broad-based effort that mobilizes 20,000 volunteers across the US to deploy interactive, user-driven, data-centred models for delivery of government services, offers an example of learning at the systems leadership level. She initially relied on a one-year fellowship programme that sent three young to mid-level technology professionals and designers to local governments to work with them to design and implement this new model for delivery of government services. She eventually realized that she could tap into a much broader range of volunteers and achieve more sustained impact if she formed "brigades" of local citizens who were willing to work on a part-time voluntary basis with their local governments to evolve these delivery models within the local contexts that they cared about.

Identify and track metrics. Systems leaders will be focused on outcomes and impact relative to the longer-term challenges and opportunities they are seeking to address. Effective systems leadership requires a clear view of the metrics that matter, particularly those that give an early indication of the likelihood of greater impact over time. For many people, these will feel very different from traditional, short-term metrics of success. For example, to shift urban traffic from cars to bicycles as the primary means of transport, an early metric might simply be to track bicycle purchases or rentals, while a longer-term, more fundamental metric might be to track reduction of car traffic on major city streets. It will also be important to find metrics that can be meaningful in terms of measuring the progress of the distributed local groups and not just of the overall systems initiative.

Provide feedback loops. If much of the initiative will be driven by distributed local groups, it is important to ensure that progress (or lack thereof) against the metrics can be made available as rapidly as possible to the distributed groups driving many of the initiatives. The real value in metrics will ultimately be in helping local groups assess their progress and iterate themselves.

Reflection. Systems leaders should resist the temptation to become consumed by the actions of the moment and instead create the space and time for both the leadership group and the distributed groups to step back and reflect on the results that have been achieved. What seemed to have the greatest impact? What were the key elements that seemed to contribute the most? What had less impact than we had expected and what can we learn from that experience? What was an outright failure and why? Systems leaders need to be able to embrace risk and failure and be comfortable engaging in the kinds of honest conversations that underpin real reflection and learning. Code for America's Jennifer Pahlka says that "part of my job is to put my head up and look around" at what progress is or is not being made and to ensure that people are having honest and open conversations about how to move forward.

Diversity and friction. In the interest of accelerating learning, it is important for systems leaders to encourage significant diversity among the participants. IDEO's Tim Brown suggests that expanding the community of participants helps to ensure a wider diversity of thinking. Diversity brings very different perspectives and experiences to the table and increases the potential to come up with more creative ideas and initiatives than if everyone comes from the same background. Yet, to really harness the benefit of this diversity, systems leaders will need to encourage cultures that welcome productive friction. If the diverse participants do not feel comfortable challenging each other in the interest of coming up with better ideas, the value of that diversity will be lost. The key is to make the friction productive so that it is done with mutual respect, driven by the shared conviction that we will come up with much better approaches if we challenge each other than if we simply accept whatever is put on the table first.

Attributes of systems leaders

Olivia Leland founded Co-Impact to assemble a group of philanthropists across the world to collaborate and support systems change efforts in the areas of education, health and economic opportunity. From her experience, “The biggest lesson has been the importance of finding leaders within those systems who can play that role of bringing the various actors together.”

So far, we have been focused on the practices that will help to drive effective systems leadership. Given this, what are the attributes that successful systems leaders will need to cultivate for themselves and for others within the systems initiative?

Have the ability to let go. Many established leaders come from hierarchical institutions where the focus is on controlling all of the resources and dictating actions from the top. Given the need to encourage distributed initiatives, systems leaders will have to be comfortable not only with encouraging that kind of local initiative and self-regulation but also insisting on it. As Jennifer Pahlka observes, “My leading has a lot of following in it.”

Encourage bias to action. Successful systems leaders will need to cultivate a strong bias to action. Having identified the right intervention points and defined the intentional system they need to mobilize, they will recognize that the most effective learning comes from action rather than pursuing extensive analysis and holding endless meetings. They will also recognize that time is everyone’s most precious asset and give participants as much opportunity as possible to contribute directly by doing the work and learning themselves.

Be comfortable with multiple time horizons. Some leaders are naturally drawn to focus on longer-term opportunities, while many others tend to be driven by performance on very short-term time horizons. Systems leadership requires embracing both time horizons to ensure long-term focus and successive instances of near-term impact that build towards the longer-term goal.

Be excited by questions and embrace ambiguity. Most leaders view questions with suspicion. After all, the mark of a strong leader is one who has all the answers. Effective systems leaders are adept at framing questions that can inspire people and help them to focus their learning. They are also comfortable with ambiguity. After all, if we are seeking to change something fundamentally, we will be treading into unfamiliar territory and there will be a lot more questions than answers, especially at the outset. People who are effective at transformative work are able to hold people together through discomfort and uncertainty.

Be humble. Effective systems leaders are humble at two levels. First, they don’t need to take credit for the impact achieved and they seek to celebrate the accomplishments of others within their system. Second, they also have intellectual humility that drives them to seek out new challenges and opportunities to learn faster. Tim Hanstad points out that his co-founder at Landesa is much more concerned with achieving change rather than getting credit for change. Humility also helps to build trust, a key factor in motivating participants to act.

Cultivate empathy. Systems leadership is ultimately about motivating many diverse participants to act together and to invest significant time and effort in the collective action. If the leaders are unable to place themselves deeply in the context of the participants they are trying to reach, and to understand their values, aspirations and fears, they will likely have only modest success in motivating the kind of action required.

Share the credit. Change-driven systems initiatives require effective participation en masse. If the leaders are not willing or able to share the credit for success with the many and instead seek to claim the credit for themselves, they will quickly drain energy from the participants. In some models, such as Crisis Action, systems leaders work behind the scenes so that public credit is directed entirely towards the participants they support. Similarly, systems leaders must be prepared to accept responsibility for failures and shift the focus to what can be learned from the failure to help everyone achieve more impact. Whether with success or failure, systems leaders must drive home that this is a collaborative effort and everyone is in it together.

Play the role of an orchestra conductor. In an orchestra, every musician has a distinct role that plays to their strength and gives them a sense of contribution, pleasure and accomplishment. Systems leaders must be adept at spotting and encouraging talent in a way that is harmonious and smooths out discordant notes.

Live the values. Effective and sustainable change will be achieved only if it adheres to the fundamental human values such as integrity and transparency that will help all of us to realize more of our potential. Effective systems leaders will have to live those values daily if they are to have any hope of ensuring that others adhere to those values, too. One of their most important tasks is to embody and model the values of the community of people setting out to achieve them as well as the kind of world and society they seek to create. This is a high bar and requires a level of integrity that has not always been manifest in successful leaders.

Common sources of failure in systems leadership efforts

The sad truth is that more systems leadership efforts fail to address the opportunities identified than succeed. What can we learn from those failures?

Too tight or too loose. Systems leadership efforts generally tend to fail when the leaders try to manage all activities too tightly or, conversely, when they leave everything up to the participants and it all begins to fragment. The key to successful systems leadership is to strike an appropriate balance between maintaining focus, enabling connection and coordination, and encouraging distributed initiatives.

Too fast or too slow. Often, there is a sense of urgency that motivates systems leadership to try to achieve the opportunity too quickly, which sets up participants for disillusionment when things take longer to materialize. On the other hand, systems leadership can be too risk-averse and invest too much time up front on analysis or discussion without action, impact or experimentation. This can also result in disillusionment as participants become discouraged about the lack of progress. Once again, balance is the key.

Too narrow or too broad. Systems leadership can sometimes underestimate the range of participants required to drive effective change and draw from pools that are too narrow to achieve the desired outcomes. On the other hand, there is also a tendency to want too many different kinds of participants in the initiative, which can slow things down or lead to divergent interests and agendas. The key is to be clear about who is needed to achieve the desired change and what role they need to play.

Too rational. Many systems leaders believe that if you gather the right data, do all the relevant analysis and present it to the right people, the mission will be accomplished. As discussed before, a key to effective systems leadership is to recognize that we are dealing with people and people are never driven solely by rational analysis. To get them to go above and beyond, they need to be emotionally engaged. To use an analogy, this approach also underestimates the power of the immune system and the antibodies that are present in all of the existing systems (just think about any attempts you have made at organizational change) and which help these systems to survive and increase their resistance to change.

Too boring. This is not quick, glamorous work. It takes resilience, patience and stamina. The role of the systems leader is also that of a coach: sustaining energy and momentum, spotting opportunities for people to take a step back and recharge, and for moments of creativity and humour to flourish. They have to make it fun – at least sometimes.

There are no golden rules or prescriptions for what will be effective. From our conversations with and experience of attempts to transform systems, these are some of the most useful practices that have worked. We also recommend the *Creative Coalition Handbook*, designed by Crisis Action – a systems initiative on armed conflict – that distils the learnings of their own experiences.

The role of platforms

Systems leadership is more likely to be highly effective if leaders adopt the practices and attributes described above. Yet the evidence suggests that systems leaders can have an even greater impact more quickly if they are able to harness the power of platforms to scale their efforts. As will be clear below, though, the platforms required to support systems leadership are quite different from the platforms that tend to be discussed in the mass media. If systems leaders are to harness the power of platforms, they will need to design platforms based on a deep understanding of the practices that contribute to effective systems leadership.

What is a platform?

Too often, we equate platforms with the technology that enables them. However, platforms are not about technology per se, they are about creating environments where people can interact more effectively with each other at scale. Platforms provide a governance structure and a set of standards and protocols designed to enhance the potential for interactions and impact among participants at a scale that would otherwise be unimaginable. There are different kinds of platforms. Most of the platforms that get attention today are aggregation platforms (think, for example, of online marketplaces), which help connect participants to make short-term transactions. Other platforms are designed to help people connect with each other and build longer-term social relationships (think of social networks).

There are two other categories of platforms that are much more relevant to systems leaders but which get relatively little attention – at least so far. Mobilization platforms are designed to bring participants together so that they can collaborate in producing a shared outcome – examples would be Wikipedia, Avaaz or Change.org. Yet another category of platforms would be learning platforms that are designed to help participants to learn faster together and accelerate their rate of performance improvement. So far, there are relatively few examples of these platforms, although SAP's Community Network, which helps application developers to improve their productivity, provides an early indicator of the potential of these platforms.

The platforms that can be most helpful to systems leaders are those that combine mobilization and learning – which are explicitly designed to mobilize participants to achieve a shared outcome and to help all of the participants accelerate performance improvement through feedback loops and other learning mechanisms.

As systems leaders consider the development and deployment of platforms to support their systems initiatives, which key design elements would be most helpful in terms of scaling their efforts and accelerating impact?

Platform design elements

The design elements that appear to be particularly important for platforms supporting change-driven systems initiatives include:

Providing shared workspaces. As participants in change-driven systems initiatives are likely to be organized into a network of small groups that are driving a diverse set of initiatives, platforms need to provide an environment for connection and collaboration that goes beyond simple conversation. For example, these platforms provide shared workspaces where groups of participants convene online to refine and evolve their plan for a specific initiative and make quick decisions.

Preserving balance. These platforms would strike an appropriate balance between focus and encouraging local initiatives. Governance structures would need to be explicit about what is permissible and what would be grounds for exclusion from the platform. Group leaders and moderators would help to focus participants on the highest-impact initiatives while at the same time creating space for divergent thinking and challenging the approaches already under consideration.

Building trust. As discussed earlier, deep, trust-based relationships can be built within the small groups that tend to form in a broader systems initiative, but that trust is more challenging to scale as the total number of participants increases. Platforms can play an important role in building trust across a larger number of participants by helping to increase the visibility of people's activity and implementing trust-building mechanisms. Examples of such mechanisms include reputation systems and, in some cases, dashboards that show where the strengths of particular individuals or groups lie so that others can reach out to them for advice and coaching. Tim Hanstad sees platforms as a key vehicle for building trust across participants that are initially suspicious of the motives of others.

Staging challenges. Mobilization and learning platforms can take inspiration from video-game design by crafting a progression of challenges that help to draw participants in with some easy challenges to give them an early sense of positive results. Then, they would raise the bar in terms of the amount of effort needed and the kind of impact required so that participants would be motivated to take their involvement to the next level.

Providing an organized forum for questions. As local groups seek to pursue initiatives, they are likely to encounter questions they frequently cannot answer within their own group. Platforms can be extremely helpful in providing a way to ask and share questions that all of the participants can see and address. Most importantly, they can also archive and index both the questions and answers so that someone who later comes in with the same question can see that it has already been asked and discover the answers more quickly.

Sharing experiences. The platforms should also do a good job of aggregating accounts of previous efforts. What did they do? What impact did they achieve? What lessons were learned? These accounts can help inspire other participants, while at the same time providing an insight into how to achieve an even greater impact. They would need to be archived and indexed in ways that make them easily accessible to other participants with an interest in learning about experiences in a particular context.

Providing feedback. Platforms can play a particularly important role in creating feedback loops that can accelerate learning and progress. This requires a clear view of the metrics that help to assess impact. Tools would need to be implemented on the platform to help capture and aggregate data regarding the impact achieved by all participants. Most importantly, the results should be made accessible to all participants so that they have a clear view not only of how they are doing but also of how others are doing, so they can learn from everyone's experience.

Developing leaders. Some platforms, such as Discourse and Wikipedia, provide indications of how a platform can assist in the development of leaders by giving participants increasingly greater responsibilities and administrator rights on the platform based on levels of participation and trust ratings from others.

As Co-Impact's Olivia Leland observed, what it comes down to is having a means to more easily share information, data and what works – in a way that isn't as controlled and can encourage others to engage and experiment with the system they are trying to change in innovative ways to increase impact.

Staging of platform design and deployment

Successful platforms tend to evolve over time. In general, systems leaders would be well-advised to avoid the temptation to overdesign platforms at the outset. Instead, they should focus on the minimum functionality required to create some important value for participants and then get that platform out to participants as quickly as possible. The simpler the platform at the outset and the more targeted it is to an immediate need of many, if not all, of the participants, the more quickly it is likely to be adopted and to achieve the critical mass that will then drive even broader adoption over time. IDEO's Tim Brown cautions that the complexity of systems makes it tempting to overdesign at the outset. Instead, he suggests that we should be prepared to iterate and redesign as we learn more.

There will be a lot to be learned by watching how participants use the platform and which features are helping to support initiatives as well as which features appear to be a hindrance. By spending time with participants as they gain experience on the platform, systems leaders can then identify unmet needs that could become the basis for new features and functions to be deployed over time.

The most common reason for platform failure is overdesign at the outset. Early participants are often overwhelmed by all of the features and functions. More importantly, many of the features and functions may be irrelevant to their real needs and often serve as barriers to their efforts to achieve more impact. It is far better to watch, learn and evolve than to try to anticipate every need in advance.

The journey ahead

Driving major change in global systems is not a trivial undertaking. It can quickly become overwhelming and often dispiriting. The key is to stage the efforts so that participants, including the systems leaders themselves, can learn as they go and achieve positive reinforcement that the effort is worth it. Avoid the temptation to do too much too quickly. And resist the notion that everyone needs to be all-hands-on-deck at every moment for the initiative to succeed. Replenishment of energy and focus is vital and requires shared leadership so that people can cycle in and out of periods of acute intensity.

The connectivity enabled by the Fourth Industrial Revolution provides an opportunity to make small moves that, if made smartly, can set big things in motion. Significant impact can be achieved with far fewer resources than would have been required in the past, and greater results can be achieved much faster than would have been previously imaginable. The key at the outset is to identify the crucial leverage points in the systems that need to be changed and then find the most motivated participants who can work through them. Be clear about the metrics that would help to determine whether these early initiatives are yielding the needed results. Once those participants and metrics have been identified, find a way to quickly provide the participants with a platform that can help them to connect more easily with each other and to learn from one another as they move from ideas to action and impact.

As quickly as possible, demonstrate some tangible results that can build credibility for the broader initiative and help to motivate others to join the effort. And invest time in getting to know people and what makes them tick, including how to make it something they find deeply rewarding and perhaps even fun. The initiative will scale from there.

As we suggested at the outset, we are still at the earliest stages of understanding the potential of systems leadership and platforms. This is very much a work in progress and we invite any and all feedback, including questions that have not been addressed in our perspective and other examples that would illustrate some of the elements of systems leadership and the platforms that can help to scale these initiatives. We are committed to learning more about this important domain and we firmly believe that we will learn faster together. Please join us on this quest.



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