

Action Workflow

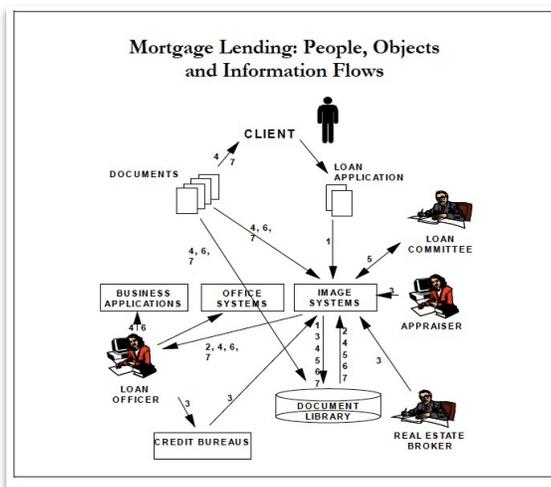
A theoretical framework on Service Design

Introduction

The **Action Workflow** is a late twentieth century theoretical framework that synthesizes the fundamentals of service design, a realm that for decades was opaque and plagued with misleading metaphors.

This framework easily covers the whole spectrum of services we may think of today from banking to crowdfunding, from colleges to MOOCs, from hotels to Airbnbs, from executive management to business accelerators, from ODS to the Cloud.

[Fabrice Grinda]



It also travels well from open markets into the world of the internal services of business enterprises without any need for structural adjustments. It's a simple framework that shows the dynamic of conversations that drive human beings from sharing dispersed speculations and gut feelings about possibilities to completing cash-based business exchanges.

Whether behind the cacophony of the Saturday Remi-Voltaire Farmers Market, or in the silent plasma of brokers' screens, the conversational rituals shaping marketable services are fundamentally the same.

It's basic structure was composed by Fernando Flores and Chauncey Bell in the early 90s. A few years later, in 1995, Flores, Bell and Bud Vieira published a short private paper called "Design and ...". In this paper they expanded the context in which the **Action Workflow** should be understood to take full advantage of it.

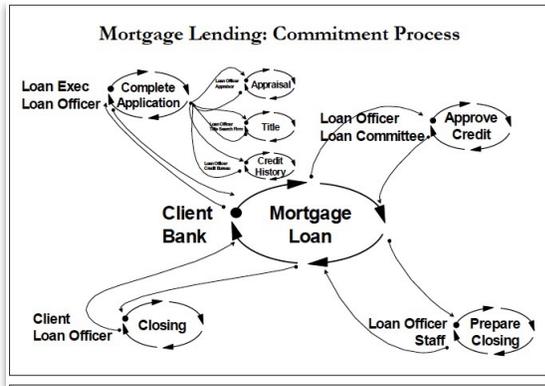
Later, there were a variety of revised and expanded published versions. Particularly relevant were the ones included in the book *Beyond Calculation: The Next Fifty Years of Computing* (Peter Denning, Robert Metcalfe); the version included in the *NewScale Pink-book* (by Rodrigo Flores and Bill Fine); and the version published in *Conversations for Action*, a compilation edited by Maria F. Letelier.

These successive versions cover multiple concerns and possibilities and go from horizontal coordination to technology and strategic speculations.



Twenty years have passed since then and the **Action Workflow** has made its way through a variety of interesting ventures, gaining reputation and reality.

It has travelled with Fernando Flores and Chauncey Bell to ATI, ABB-Siemens and Cemex among many others. It traveled with Terry Winograd to the advanced software design labs of Stanford University. With Rodrigo Flores to NewScale Service Catalogs, Cisco Cloud and lately to Accenture Cloud Services. It has traveled with Billy Glennon and Charles Spinoso to Intelligent Finance, SSE Capital Investments and many other interesting projects across Ireland and the UK. And there are many others, like me, who have worked with it, thought with it and lived with it.



I introduced it to Genentech, Boston Consulting Group, Cambridge neuroscience students, ChinaHR online recruitment, and to many other services such as finance, banking, education, software, retail and renewable energy.

Its fundamental structure was absorbed by the Internet boom and turned out to be a very economical design language to define the structure of a variety of online marketplaces.

I saw its birth in California's 90s and it has been my most reliable consulting companion since then. Most of what I know about it has been developed in decades of conversations with Chauncey Bell and our customers. But, beyond all that, I've also learned to let him - *the loop* - speak out by himself and guide all sorts of controversies and speculative *service design solutions*.

I've seen extremely experienced people working with it. Kenneth Massey - working with *Business Design Associates* in 1995 - was the architect of the legendary Cemex Ready Mix service design project and he used it to cross-appropriate practices from Houston's 911 Fire Department, the then emerging Fed-Ex, and the flexibility of Rome's remodeling business in a competitive Ready Mix service. And I've seen young and unexperienced people from different cultural backgrounds, like ChinaHR people in Beijing, trying to make sense of their recruitment business commercial practices through it.

It provides a secure access to fresh ways to think about shaping business practices.

The fundamental purpose of the **Action Workflow** is to distinguish a pattern of conversations that can help business designers and practitioners to recover a vital and genuine relationship with language and above all, to offer a direct path to *action-based care* in business networked worlds.



The purpose of this brief paper is to show how this conceptual framework has evolved and how it has maintained its vibrancy along the years.



The initial specification

It's broadly known that the main sources and theoretical underpinnings of the Action Workflow are originally based or influenced by John L. Austin's *performative verbs* insight and John Searle's *speech acts theory*; by Heidegger and Gadamer's hermeneutics in a Hubert Dreyfus fashion; by a critical review of Habermas' Theory of Action; and finally, although historically it was an earlier source of inspiration to the overall insight, by a biological understanding of human experience and language based in the work of H. Maturana and Francisco Varela.

All these 'pieces' were slowly coming together while tackling practical questions raised by a variety of demanding and unique environments such as the **Cybersyn**¹ project, or the disruptive PC eruption at the Stanford Computer Science department.

Following the 1995 early document of Flores, Bell and Vieira, I'll start by clarifying the nature of the conversation that is being crystallized in the Action Workflow, or - as it has been popularized - the 'loop'.

The organizing principle of the Action Workflow is **action**. Everything in it is orchestrated by action, a principle that fits well with the American *pragmatist* tradition.

However, familiarity with the notion of 'action', while it seems to bring simplicity to the whole framework, also carries some misleading confusion. 'Action' is not an obvious phenomenon, and requires some clarification.

'Action' has become a 'black box' that we just take for granted, without careful examination. The purpose of the following sections is to open up this black box and to reveal the distinctive understanding of 'action' embedded in the Action Workflow.

Action

In a broad sense, 'action' is a verdict that is made by someone - competent and entitled - who establishes that a change of state has happened. There is an initial situation 'A' and - after some time - a final situation 'B', that allows that qualified witness - equipped with particular shared standards, metrics and instruments - to declare that a change of state and possibilities has happened.

This is the same type of declaration that a referee - sanctioning a goal - does in a soccer match. It is important to notice that what constitutes the goal in the game it is not the fact that the ball

¹ Evgeny Morozov. A Critic at Large, New Yorker October 13, 2014 Issue. The Planning Machine: Project Cybersyn and the origins of the Big Data nation.



trespasses the goal line, but the fact that the referee - the authority institutionally entitled to make those declarations - declares the goal as valid².

Implicitly in the early specification of the loop, there was an interpretation of action - that a witness had to satisfy - in order to declare that an action had happened. Action was interpreted as, and only as, the *declaration of satisfaction* of a customer entitled to declare the completion of a set of observable *conditions of satisfaction* explicitly promised by a performer (or supplier).

It is worth to note here that there are two simultaneous actions tracked by the Action Workflow. First, the establishment of the relational context - customer-performer - required by the service relationship. The mere acceptance of an offer or the acceptance of a request in a conversation between two individuals or legal entities already defines customer-performer type of role identities and a relational context. The second action tracked is the promise to complete a promise in the future.

In other words, action is not a context free phenomenon. It requires a state of affairs provided by a specific type of relationship: a customer-performer relationship. In the context of that type of relationship, commitments can be exchanged. Those commitments will frame action as the customer's *assessment of satisfaction with the completion of the promise*, grounded in the conditions of satisfaction of the initial provider's promise.

This understanding of action, implicit in the composition of the Action Workflow, captures the essence of a virtuous 'service conversation'. Action is, and only is, the completion of a contractual agreement that *drives satisfaction to the customer* in their own terms. Consequently, delivering a particular action implies that we were already able to listen to:

1. The observable conditions of satisfaction in that particular request/promise.
2. The obvious expectations and standards that were tacitly implied in that request.
3. The subtle concerns and emotional orientations towards the request that suggested a specific customer's nuances and priorities.

In summary, delivering action in this approach implies a sophisticated sensitivity to care for others in their particular situations and to actively manage customer expectations - making explicit both what we think the customer may be expecting and what we are not going to deliver.

This understanding of action already cares and already accepts risks and uncertainty as constitutional dimensions of the customer-performer relationship; consequently, good practices for harnessing and managing natural and inevitable breakdowns to resolution - with grace and humor - are a 'must have'.

This is a rather unsettling formulation of action that collides with our modern common sense. It can be argued that this is a 'relativistic' or 'subjective' approach that leaves open a wide space for misunderstandings and mis-coordination. It can be argued that it is a 'utopia' that may drive towards customer abuse, but is not a realistic business standard for observing action "objectively".

Well, let's try to address these interesting objections.

² Of course erratic declarations will degrade the authority of a referee or any other 'witnessing' role.



First, the fact that we claim to have an ‘objective’ perspective on action, and observer-independent criteria to assess action is both a deeply felt belief in most of us, and a complete *non-sense*. Action is always ‘an action for someone’; that is why *something* may be experienced as ‘flattering’ for person A and at the very same time ‘offensive’ for person B. Action is always framed from an inescapable background of dispositions and interpretations.

Now, this ‘non-sense’ in our commonsense needs to be pondered. This misleading ‘magic’ called ‘objectivity’ is blind to the fact that ‘objectivity’ is a networked social practice. ‘Objectivity’ needs to be built by a community of participants and it is the opposite of ‘observer-independent’; it is ‘observer-bonded’. ‘Objectivity’ only gets expanded and can only travel inasmuch as we expand the networked community of role identities that can distinguish the distinction to observe a particular action, that can operate with the distinction to distinguish what is an action from what is not an action, and that can complete a procedure for observing that has been validated by their particular community.

This is true for the community of scientists developing nanotechnology or for the community of a mother and child dealing with the everyday task of organizing the family’s bedrooms. Both have to negotiate the specification of conditions of satisfaction that will allow them to claim that the action was delivered or not; both will go through an endless process of trials, successes, mistakes, learnings and adjustments; both will create a shared world of practices, tools, language, metrics and conversations that will expand, refine and deepen their ‘observer-bonded’ ‘objectivity’ in the same fashion that the Higgs boson travels from the CERN hadron collider to Stanford’s theoretical physics blackboards.

No matter how much time is invested in expanding this ‘observer-bonded’ objectivity, it will always be vulnerable. It will be constitutively vulnerable due to the fact that human beings have an infinite capacity to refine and invent new linguistic distinctions, observations, practices and to enroll new types of beings in their networks; or because the networked community cultivating the observer of a particular action will gain complexity and diversity, adding new requirements or controversies to the distinction to observe a particular action; or simply because emerging natural or social phenomenon may reshuffle the cosmic order.

This drives us to address the second objection which claims that it is a “utopia” to design with a standard that requires to claim that action is, and only is, *recurrent customer satisfaction*. The misleading point of this argument is that ‘aiming for perfection’ - recurrent customer satisfaction - is unsustainable. But, the design concept implicit in the Action Workflow is not claiming that perfection must be embedded in every single piece of design. On the contrary, its claim is that short iterations and a steep learning curve is a more valuable approach. It is not perfection, but a consistent bayesian asymptotic process of approximation.

The composition of the **Action Workflow** invites the designer to focus her attention in the constitutive tension between the delivery of the conditions of satisfaction - as declared by the provider and/or validated by the customer - and the concerns that the customer cares about. When customers are disappointed, that tension is almost invariably obvious and visible; but when customers are astounded by the delivery of a particular service, that tension is there too. That is why in the **Action Workflow** approach, catching and responding to blunt or subtle unmet expectations is the focus, instead of trying to build the perfect, universal ‘utopia’ before any implementation or operation.



What the Action Workflow is inviting is to consider ‘action’ as a networked multilayered onion, that gains in value and market competitiveness by adding layers of concerns in a single action.

Think about a traditional utility. If we are in the energy sector, we want, every time a jointer is tightening the bolts of a particular cable overlay joint on a circuit, to simultaneously deliver customer satisfaction, regulatory compliance, community safety, cost efficiency, environmental sustainability, social sustainability, a healthy work environment, profit to investors, political votes for our allies and long-term performance. One service action, multiple networked layers of concerns welded together.

The loop is a design framework that enables us to gather, track and shape all these apparently unrelated conversations in a unifying fashion.

Conversations

In order to track and drive action, the **Action Workflow** integrates two types of conversations. *Conversations for Action (CFA)* and *Conversations for Possibilities (CFP)*. The first articulation of these conversations was sketched in Flores’ Ph.D. Thesis titled “Management and Communication in the Office of the Future”. A new version of these conversation emerged in his book with Winograd “Understanding Computers and Cognition” and later versions were developed by Action Technologies engineers and Business Design Associates consultants.

The **Conversation for Action (CFA)** is an algorithm that defines the minimal structure and organization of a conversation aimed to coordinate a specific action in a given moment of time. The components of the conversation are commitments - or ‘performative verbs’ in John L. Austin’s terms. The organization is defined by all the potential combinations of alternative statuses that drive the conversation to a happy conclusion.

In a CFA, action can be enacted only by making a ‘request’ or making an ‘offer’. The fact that there are only *two ways of driving action* in a conversation brings enormous simplicity and focus. If something is missing, something is not happening, or some expectation has not been met, then it is a sign that we may need to make a *request* or *offer* to someone. Nothing else. Complaining won’t work, gossiping won’t work, falling into resentment or resignation won’t work; nothing but making a request or an offer that elicits a promise from someone else. It is simple, pragmatic and deeply caring.

Requests and Offers are specific types of commitments - performative verbs - that need to satisfy a variety of conditions in the interpretation of the listener in order to drive action. This is a very critical point. Flores developed a particular ‘hermeneutic’ of commitments. In his view, what constitutes a particular commitment is not what is uttered by a speaker, but what is listened to by his or her targeted listeners. Or more generally, utterances only exist in specific listenings of others. For instance, in order to make an effective request, the targeted potential performer must listen - or *fall* into the interpretation - that she or he has been requested by an accountable counterpart to perform something that has explicit conditions of satisfaction, to be completed by a defined date and time. In addition, she or he tacitly assumes - in his/her automatic interpretation - that the requester and the promiser shares the same quality standards and the



same understanding about tacit expectations on requirements. Finally, they also assume some level of trust, sincerity and skills to perform the task. If any of these conditions, or 'felicity conditions' as John L. Austin called them, are not aligned, then we are exposed to mis-coordination risks and waste.

A request can be uttered and interpreted in a variety of forms that, depending on the particular context, triggers an assessment of force - perlocutionary effect, in John Searle's terms. This assessment of force grants room for maneuver and consequences to the specific responses of the participants in a conversation. For instance, a request can be expressed as a *command* or *suggestion*, *invitation* or desperate *begging*, suggesting something about the already agreed nature of the relationship and also about the relative power - capacity to get the promises you are looking for, or bargaining power - in the conversation. This relational aspect is valid for all types of commitments.

I won't do an exhaustive review of Flores' commitment taxonomy. It is available in multiple documents, books and other forms of texts. I'll just mention that he distinguishes six categories of performative verbs or commitments: *requests*, *offers*, *promises*, *declarations*, *assessments* and *assertions*. The first five categories of commitments are about bringing forth new actions or possibilities for action. The sixth is about successfully establishing the veracity, falsehood or indeterminacy of a past event by establishing the conditions of observation - distinguishing the criteria of observation - and executing the observations in compliance with the accepted shared standards of a particular community.

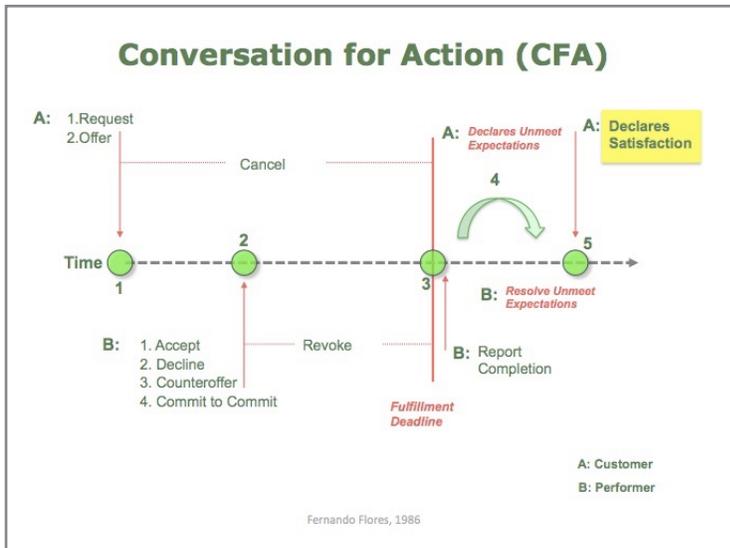
Let's focus our attention on sketching the structure of the Conversation for Action. As I said above, a CFA starts with either a request or an offer. In response to this first move, we can only make four types of commitment: I may accept - "I promise to do x by time y"; I may decline - "I promise not to do x"; I may counteroffer - "I offer to do x by time z instead of y" or "I offer to do y instead of x by the same time y" or a combination; and finally, I may promise to promise later - "I promise not to make a promise now and I promise to make a promise in two days from now".

Any other answer than these four commitments to the initial move - a request or offer - will produce mistrust, mis-coordination and some sort of waste. When we achieve an agreement on the promise and its conditions of satisfaction, we move to execution, the third moment in the CFA choreography. In the execution phase again, there is a possibility of additional commitments, such as canceling or re-negotiating the deliverables.

Finally, when the promise has been completed, the performer makes a declaration of completion to announce that the action he or she promised to deliver has been completed as agreed. When the customer receives the declaration of completion, she or he evaluates the deliverables and makes her/his objections, requests for improvements, complaints, etc. When all these 'unmet expectations' get resolved adequately, the customer will make a Declaration of Satisfaction.

This is the typical conversation dynamic that we encounter today in a good customer service department checking for any unmet expectation, or with Amazon.com's third parties assuring you they've got what you were looking for, or with any supplier competing for reputation, positive feedback or 'likes' in the web.





It is also the typical structure of a team’s management ‘review meeting’. The following graphic illustrates the dynamic of the conversation.

CFA is a very powerful framework for a variety of reasons:

- First, it produces focus to assess missing commitments in a particular conversation.
- Second, it provides a solid foundation to reconstruct the trajectory of historical conversations and commitments that are shaping the current situation and that are constituting the current entities in a particular business interaction.
- Third, it provides a framework to design the context for future conversations, or in other words, it allows you to create agreements - mutual commitments - to have conversations in such a way that it is possible to cover subjects or to intervene in areas that were not possible before. CFA are the building blocks, and extremely flexible ‘legos’, to intervene and shape any situation.

However, human beings in general and business people in particular, do not start any initiative or open any CFA if they do not anticipate possibilities. The anticipation of possibilities is the source of enthusiasm, ambition, or zeal that drives towards action.

Actions are pulled by people committed to some sort of possibility, people that already care about something. A ‘possibility’ is a particular type of interpretation. It is an assessment that something which matters may or may not be available for someone in a particular domain of her/his concerns. We assess possibilities when we engage in conversations in which ‘something’ creates space for us to take care of ‘something’ in a more meaningful or powerful way, or when we can anticipate and mitigate some imminent risks in a particular domain of our concerns.

Conversation for Possibilities (CFP) is the second type of conversations we will distinguish as a constitutive part of the *flow* of the Action Workflow. Our everyday language to invite a CFP is to say something like “let’s do some brainstorming” or “let’s think out of the box” or simply starting a conversation with a “What if...” Somehow CFP are an invitation to a game in which people have some room to speak out about something which they are not fully clear about, or to take the risk to speak a bit of non-sense in the conversation, or to have room to question some sacred beliefs or assumptions that have been orienting the conversation until now even though they may not have any solid grounding for their criticism. Less often it may also imply the invitation to share more direct feedback on each other’s views about team members’ past performance, and rarely it also encompasses a deliberate effort to challenge and unsettle core corporate or market discourses, core cultural values or significant components of a business model blocking new business possibilities.



Conversations for Possibilities are challenging, problematic and often highly valuable. Changing the scope of possibilities beyond the already available comfort zone - meaning entering into the unsettling zone of perplexity, bewilderment and wonder - often affects the balance of power of key business roles, uncovers new risks, triggers political friction, and requires high commitment and significant resources to be able to mature and harvest the benefits. This is always the case.

The smaller the scope of the CFP, the less the disruption, but also the less relevant the upside becomes. That is why major conversations for possibilities often only happen when a major breakdown has already happened, when facing ominous catastrophes that menace the sustainability of a business, or after a long, unbearable process of deterioration.

The CFP is a less structured conversation than the CFA. Its main components are *narratives* that hold together a plot of possibilities and risks, where possibilities and risks are a set of assessments knitted and grounded in particular theoretical discourses, distinctions and practices. CFP at their early stages - and often the most critical - not only make use of business narratives and assessments, but also include more adventurous rhetoric such as poetic or conceptual metaphors or languages other than words which capture relevant patterns of the situation and its possibilities.

I'll organize the CFP as a composition with four movements partially brought from my work with Chauncey Bell, and partially from my conversations with Fernando Flores on Bruno Latour's³ understanding of networks' life cycles. I'll illustrate the CFP borrowing from a habitual business context.

The first movement in a CFP is about *breaking the inertia* of networked habits, overcoming cultural numbness, awakening despair in the middle of denial, gathering *conviction* to engage in a conversation for possibilities that may require attacking some current sacred consensus. The critical piece of work at this point is to be able to articulate a *manifesto* revealing the non-sense of the status quo, transforming the status quo into a 'criminal' unacceptable attitude. A good outcome from this phase is the assemblage of a small team of activists enrolled from multiple areas of the organization, including some relevant natural leaders; the identification of a few speculations about areas worth exploring; the sketch of a new approach/framework that reveals previously unnoticed areas of opportunity; a few illustrations of the potential value of some of those opportunities; and finally, some resources or approved budget to build a business case for investors.

The second movement of the CFP is about *consultation* and building the social, networked mind to diagnose, sketch a high-level conceptual design, and deliver a business case proposal. Do we have the right voices in this network of conversations? Are we missing someone embodying crucial concerns we should care about in this intent? Do we have the right voices with the right skills, styles and force to unsettle our beliefs and bringing forth new sources of conviction? How should we re-arrange who is the 'we', 'you' and 'them' in this situation? Who are the relevant people that embody the past we are trying to leave behind, the people who embody aspects of the future we are trying to bring forth, and the people that we need to enroll in our intent who are as yet ambivalent?

³ Politics of Nature: How to bring the science into Democracy (1999).



At the end of this second phase of conversations, if you are in a business context, you would like to have a business case declaring the value exchange - the value for you and value for us; a value model grounded in the conceptual design of the new operating model specifying key value drivers and metrics; and an iterative change strategy with a roadmap of the overall journey and some practices to lead the process. In more general terms, what you would like to have at the end of this phase are 'stories of possibilities', a few 'diagnostic assessments' and a 'mobilization plan'.

For instance, the anticipation of scenarios is a type of storytelling to articulate possibilities. Stories do not have more reality because they are true; they have more reality because they disclose more powerful and meaningful possibilities which enroll people, institutions, technology, and nature in invincible coalitions.

In the same vein, a 'diagnostic assessment' is not valuable because it is well grounded, it is valuable because it discloses possibilities that were not available before. The core of making an assessment about a situation, an entity or a person is making the promise to make a new possibility available for him, her, you, we or them.

Finally, there is no point in anticipating scenarios or articulating diagnostic assessments if there is no commitment to the preparation of the *mobilization*.

The third movement of a CFP is about *immersion and mobilization*. You want to put your value hypothesis in motion, but with different levels of resolution, different risk exposures and different conditions of satisfaction for your output. You want to run some trials, to uncover the real, concrete response of the terrain, the unknown-unknowns, the unexpected favorable forces, the sort of skills and styles needed to succeed. You want to let yourself be affected by the immersion and to adjust your intent, your uncertainties, your risks and your customer's expectations. You may also want to run a small scale prototype, with the purpose of improving it, building a few sustainable components and demonstrating that you have a solid business case for rolling out a disruptive change in the marketplace.

The fourth movement is about *extending the reach and reality* of the mobilization while settling into the new mindset. The CFP isn't focused in unsettling anymore, but in selling, enrolling and progressively becoming part of a new emerging commonsense - language of distinctions, practices, beliefs. If you are moving in a business context, you are mostly concerned with adjusting and aligning the institutional structure to the new order.

In synthesis, a CFP is a network of conversations cultivated for the sake of unblocking the natural flow toward authentic care. A conversation aimed to awaken to the drift, inertia and habit to fit-in automatically inside the boundaries of a particular historical world; a conversation to unsettle and prepare yourself to intervene with genuine conviction; a conversation opening the space for you to run some trials and learn from errors, giving room to the emerging world to affect your mindset, your mood, yourself; and finally, a conversation to let the new emerging commonsense thrive by itself and to continue challenging you and your team.

CFA and CFP are not 'things' to be 'identified' in the world in a 'pure' state. They are observer perspectives that reveal valuable aspects of a phenomenon. In our everyday life experience there is no such a thing as a pure, naked CFA or a clean cut CFP. In our everyday experience, we are already drifting and coping moment to moment in the wide and intermingled flow of



nature and human civilization. We are always already *thrown* in a blend of partially accessible, historical flow of conversations that show up against the background of care - personal care, team care, institutional care, fiduciary care, or average cultural care. Caring in the contingency of being thrown into a historical drift of worlds, markets, and innovations triggers multiple and interplaying CFA and CFP that flow from us either driven by habit or by design.

The vital force of these conversations are synthesized in the Action Workflow. An **Action Workflow** that can be as simple as the request for a “taquito al pastor” at “El Tizoncito” in “La Condesa”, a “salty beef” at the East End in “Brick Line St.” or as complex as the UN’s request to the International Panel of Climate Change to make a definite diagnostic assessment on human-based climate change.

In each case, using the Action Workflow, we will be able to reconstruct our networked conversations, with all their goods and bads. We will be able to diagnose issues and opportunities, opening new CFP. And finally, we will be able to design new networked conversations or processes, more structured conversations or management practices, limited scope, or activate any other ‘social wave’ or ‘swarm’ to break stagnation.

In a more general sense, this interplay of CFP and CFA constitutes a significant portion of what we call the ‘human mind’. From this perspective, the mind is not a private conversational phenomenon inside the head, but a social conversational phenomenon in the network. Consequently, designing better interplays of CFP and CFA to enable specific service offerings affects as much the quality of your thinking as the quality of your collective performance. Although we won’t develop this topic in this paper, we offer it as a provocation for further conversations.

Agency

So far, what flows in our Action Workflow are conversations. What flows is an interplay of CFP and CFA. CFP and CFA are the most vibrant happy paths of any business, institution or collective that cares about expanding or enriching their worlds. In other words, CFP and CFA are fundamental conversations to express authentic care for a particular world.

In the same fashion we have characterized conversations that enhance human genuine care, or business genuine care. We can do the opposite and characterize conversations that degrade the possibility of care in the sense of damaging the possibility of bringing forth *action to take care* of *something* that matters to *someone*. Martin Heidegger, the creator of the ‘hermeneutical ontology’ in which the Action Workflow is based, characterized three types of conversations that avoid or block the flow of authentic care: *idle talk*, *curiosity*, and *ambiguity*.

Idle talk is a way of engaging in conversation with others in which there is no commitment to address any specific concern, change any particular situation, have any conversation about the quality of the conversation itself, or question any assumptions implicit in the flow of the conversation. ‘Idle’ is a drifting ‘inactive’ activity in which the language of the conversation shows up as tool for being ‘connected’ without communication.



Curiosity is the orientation to the new, the trendy, the last gossip, the last news without any other concern but sharing *opinions* - uncommitted ungrounded assessments - about random emerging matters and their novelty. Novelty has value in itself and not necessarily in relation to specific concerns.

Ambiguity is a conversational drift that avoids committing to anything. Everything is relative, the world by itself does not offer a solid base to take any stance about anything. Every time you achieve a possible base to build a case for committed care about something, you discover the flaws of that 'illusory transcendence' and abandon the case definitely, to start over with something else later and repeat the process all over again and again.

The Action Workflow makes a fundamental contribution in a territory that Heidegger's "Being and Time" barely sketched as an existential issue embedded in our conversational patterns or 'discourse' as he called it.

Making distinctions about conversations allows us to bring them back to the foreground and to be able to observe, assess, and adjust the type of conversations we engage in.

Borrowing from Beatrice Han-Pile, these conversations belong to what I'll call the territory of '*active agency*' (AA) - the space in which we discuss, analyze, ponder and make decisions about alternative action paths. Furthermore, it is a territory in which we can also take one step back and have a discussion about *the validity of the theoretical traditions* in which we are grounding our conversations. And we can go even further, three layers up, and have a conversation, about the conversation, about the conversations we are having. And we can continue further up, defining new observers, new levels of abstraction, and new scopes of intervention in a cascade of conversation. This is *active agency*, we see ourselves as if we were making decisions and expressing intentions in our actions by ascribing stories, rational explanations to it. We are inventing practices and role identities for having conversations about our conversations.

However, as Heidegger and others claimed about a century ago, there is another fundamental aspect of agency that is not 'active', or not 'conscious'. It is agency without 'occurrentness' in H. Dreyfus terms. This dimension of agency is what we often call *habits*. Habits are by far the largest driving force in our everyday life practices, or following Heidegger, in our everyday life networked background practices. These networked background practices are isomorphic with what Thomas Kuhn captured with his notion of '*paradigm*' in science, or from what more recently, Bruno Latour articulated in his book, 'Science in Action', as 'blackboxes' and the production of nature.

For Kuhn, paradigms are so familiar, pervasive and tacitly learned by immersion in social practices, that are both decisive and invisible. For Latour, it is a similar phenomenon. The historical settlement of scientific controversies produces unquestioned assumptions or 'blackboxes' that become such obvious, ubiquitous and institutionalized building blocks of our conversations that we lose the capacity to see them, react to them, or challenge the powerful networked coalitions of qualified speakers that work in the preservation of those 'blackboxes'.

Uncovering the role of networked background practices in driving human action - the 'availableness' in Hubert Dreyfus terminology - is one of the fundamental contribution of Heidegger's 'Being & Time'. He not only uncovered its relevance, but he also made a few other



related claims that hammered and fractured our commonsense. For instance, he claimed that our way of being is more fundamentally defined by our habits - networked background practices - than by what we might call 'our mind' or our 'Self'. He claimed that the more embedded and familiar the habit is in us, the more inaccessible it is. He claimed that the access to our networked background practices embedded in our habits is always partial, incomplete and, on top of that, it doesn't come primarily from our 'awareness' of ourselves, but from the contrast, frictions, or 'distantiality' it produces in the everyday dealing with others'. Our self-awareness come from the encounters with others in our shared worlds.

In summary, Heidegger warned us and said to the modern culture, watch out, your mind does not have understanding; your embodied networked background practices have the soul of it. Do you want to design and transform something? Look up in the dark background, in the foggy displacement of forces, listen to how the future is colliding with your past and listen to your past giving room to an emerging new future. You need to prepare yourself to feel it, sense it, before you can even *bobble* about it, Heidegger seems to suggest. The background practices are not immediately accessible; it takes time, patience to see them at some extent, and they have a different language, their own language.

We will call this domain 'understanding⁴' or "*passive agency*". In other words, *passive agency* is the overwhelming force driving our patterns of conversation and action even before we become aware of it. *Passive agency* is the *beliefs* embedded in our *myths and legends*, our *ethical values*, our sense of *aesthetic taste*, our *tacit norms*, *discursive distinctions*, *cultural background narratives*, *transparent quality standards*, *skills* and all patterns of interpretations that define the singular background that projects us to the next reaction.

The power of the Action Workflow is to specify a sequence of conversational practices that exclude wasteful conversations - idle, curiosity, ambiguity - and shape the space of service interactions in such a way that aspects of the dominant understanding are tweaked and *genuine care* is enabled.

Then, at this point we have added another dimension to what circulates in the Action Workflow. We have a flow of CFP and CFA - 'active agency' - and we have the second dimension of the flow driven by networked background practices or *understanding* - 'passive agency'.

The whole point of making this distinction between 'active agency' and 'passive agency' is to make it clear that most of the time you will need to use 'active agency' to intervene and adjust undesired 'passive agency' limiting the impact and performance of your designs. Orchestrating and balancing AA and PA is what brings the quality of harmony and healthy evolution in your designs.

Now, lets go to the third force circulating in the Action Workflow: the realm of the heart and feelings, the tumultuous and tempestuous Plato's thymus, or what the modern man refers to using controversial notions such as passions, emotions, or moods.

⁴ We use the distinction 'understanding' in Heidegger's sense of it, as a background of sensitivities, skills for coping and projection to specific possibilities. We do not use 'understanding' in the sense of articulating explanations of a particular event.



The intelligence of the Heart

What circulates in the Action Workflow has direction and intensity. What circulates is active agency, passive agency and emotions. Only active agency gives us access to affect the other two dimensions of the flow.

We may think about emotions and moods as energy moving in recurrent patterns across a networked community, or just as a pure disposition to act in some direction and not in others, or simply as a way in which we *react from the past, to situations in the present, projecting us to a specific future action path.*

Heidegger claims that emotions are as primordial as understanding and conversations to shape a situation. However we need to be cautious, they can be the equals of understanding or conversations, but they are faster, they are overwhelming, they are occasionally foggy or blended or ephemeral, they are contagious, they are an 'elite' force shaping action. They arrive earlier to situations configuring in advance what is possible for understanding or what is possible for CFP/CPA. Often we are forced to pause to see them as they come, and then to recover our breath and the rhythms and music of our soul.

Emotions are the force that the Scotsman empiricist David Hume claimed the French rationalist Descartes completely missed as the fundamental driver of human action. But both were right. Depending on the moment in the 'being thrown' into the flow, reasons -active and passive agency- or emotions are more or less active in shaping the very same flow. Hume didn't find room for both in their time. Others continued with the task. It took another three centuries to ripen.

I'll try to illustrate the point with a common experience: learning a new skill. When you are a beginner in a domain, your coach asks you to follow instructions and to not follow your emotions. The coach knows that your nervous system has never coupled - coped - with the domain of networked practices in which you are going to immerse yourself for the first time. The coach asks you to distance yourself from your emotions, to let them come and go without attachments, and to stick fiercely to procedures, instructions, and practices in the middle of a noisy and overwhelming upheaval going on in your heart. But time passes - days, decades - and you are tuned with the world in a new way. Then, the coach asks you to distance yourself from procedures, rules, thoughts and to just surrender to your emotions and let them drive you to excellence and virtuosity. From now on, your heart will drive the business. The coach asks you to free your mind from this domain of action and give attention to subtle nuances and tiny misalignments to refine your emerging virtuosity. The coach walks beside you on the journey of cultivating and honing the emotions that will help you to sense, see, learn, design and intervene in more subtle dimensions of your worlds.

We won't speak much about emotions or moods in this short paper. We just want to point out that they play a critical role in enabling or blocking conversations; and we also want to provide you with a few specific illustrations to give you a flavor of the phenomenon and a provocation for you to study the subject more seriously. When designing a complex service using Action Workflow, it is critical to keep in mind the emotional space you need to create by design in order to favor the completion of some specific conversations.



Let's tweak our understanding of time, in such a way that we can use it to anchor our perspective on emotions and moods. We are used to thinking that the past is behind us, like an inert by-product of our life. A corpse. That the future is ahead. And that the present is that place from which we observe the timeline to make our decisions.

But what if this understanding of time is just a misleading illusion? What if the past never passes, the future has always already arrived, and the present is an inaccessible black spot? Or what if the arrows of time, instead of in an eternal fugue going backward and forward further away from us, are coming toward us - colliding in us - from the obscure past and the incommensurable future? Or what if the past is ungrounded and contingent, the present impermanent and closed, and the future emerging and uncertain? What if the past evolves eternally in us, shaped - pierced, shattered, carved, recoupled - by the emerging forces of the future?

If we accept these new 'ifs', 'ors', or 'ands' to articulate our experience of time, then we are in a journey of perpetual micro or macro changes everyday, every minute, every decade. We are in a journey with rhythms in which everything is changing toward degradation or emergence. We may have the chance to align ourselves with the forces of those changes in a genuine and singular way or we can resist those forces and endure the waves. Or we may fall into denial, and experience blindly the consequences of the seasons.

Emotion happens in reaction to events that break the transparency of our absorbed coping with the world, or in reaction to events that settle us into that world. The nature of the event does not define the direction of the emotion. What defines the direction of the emotion is the *tacit plotting* that makes the event intelligible in someone's hermeneutical space.

We claim that this plotting can be reconstructed as a set of assessments about the event. For instance, let's illustrate the point with rage.

Any event can trigger *rage* if, and only if it is transparently interpreted in a way that satisfies the following conditions or *conversational pattern*:

1. 'I assess that you are **damaging** me.'
2. 'I assess that you are **aware** that what you are doing is damaging me, but you choose to do it anyway.'
3. 'I assess that you are perfectly **competent** to act in an alternative way that could avoid damaging me, but you don't.'
4. 'I assess that you are never going to accept and recognize publicly what you are doing, you will lie or disguise, but will never make yourself accountable for the damage you have caused me. **I'll never be able to trust you.** I've no alternative but to destroy you.'

Of course, the concrete rhetoric of *rage's* transparent interpretation, its poetry and nuances - although fundamental to make sense of the situation - are not 'holdable' with this 'general pattern framework'. The concrete, natural voice of the moment must be held as such, and the pattern of *rage's* hermeneutical structure should be recognized in that natural voice, while we let it manifest itself, keeping ourselves open, humble - '*medio passive agency*' - toward the phenomenon, sensing its subtleties of the possibilities it discloses.



It's worth reminding at this point that a key presupposition of our approach is that the phenomenon is *irreducible*. The phenomenon and the articulation of the phenomenon live in different domains of action and one cannot be fully captured or reduced to the other. Appreciating this interplay between the phenomenon on one side, and conversations on the other, as unfolding iterative interpretations and possibilities that come and go, offers a better perspective.

After this short detour, let's return to our way of distinguishing emotions as in our example on rage. The four conditions of this 'hermeneutic' of *rage* are needed to trigger rage. Failing in any of the conditions will trigger a different emotion. We can be "damaged" by someone/something, but if we do not ascribe intentionality, competence and distrust to the person responsible for the "damage", we won't experience rage. We will experience something else. We would be damaged or hurt, while at the same time experiencing sympathy toward the person that did it. That person may show up to us just as an oblivious or incompetent funny person that needs some help to stop producing these problematic situations.

The emotion or disposition we are distinguishing as rage is not necessarily good or bad. The assessment 'good' or 'bad' will be made in relationship to a particular situation. Rage may lead to destructive retaliations, may expand distrust, may close possibilities to listen to each other's concerns, may thin the scope of collaboration. But rage may also bring interesting things. It may surface previously unnoticed issues, may help someone to break his/her silence and recover their voice, or it may create a valuable crisis. If you are in a situation in which you need to expand the capacity of two teams to listen to each other, rage is definitely not the right emotion, or at least not my first choice. So you can start by making rage visible; then follow by showing the dispositions for actions that open and the dispositions of actions that close; thirdly, showing the patterns of the rage's hermeneutic; and finally, challenging some of the components of that hermeneutic and dissolving the rage in a blink of eye to open the space for the emergence of new emotions.

Any emotion can be re-constructed following the same path we have done with rage. For instance, the emotion *excitement* can be interpreted as the anticipation of the exuberantly joyful fulfillment of vibrant desires in a particular event. Not just a personal experience of fulfillment, but the anticipation of others joining in the celebration. Then, the hermeneutic of 'excitement', could be articulated in an interpretative pattern like:

1. I anticipate I'll receive a 'gift' in this event.
2. I assess that the coming event will sate my vivid desires.
3. But not only that. I assess I'll have *ecstatic* moments *beyond* my imagination.
4. I assess that everybody will happily join with me in this communal celebration and share my joy.

[I need a paragraph re-connecting each of these emotions with the temporality].

[I need to say something about the historical, social, cultural aspect of emotions and moods]

Or we can reconstruct guilt or fear or shame or frustration in such a way that the hermeneutics of the emotion get visible and we get in position to modify it.



Moods are similar although more stable and larger in scope, given that they are not related to an individual event but to a *trajectory of events that is ascribed to an **specific individual*** - another or yourself.

This ascription has the form of a narration, a story that picks events up and links them with a plot and a plausible set of hypothetical causes and effects - stimulus and reactions, motivations and behaviors - shaping what we will later call a person, a team a company, or myself.

The story and the entity that the story knits together are two inseparable sides of the same coin.

The individual, the team or the Self are always already interpreted as belonging to a particular world and projected to possibilities in that concrete everyday world. This interpretation can be explicit or tacit.

We distinguish moods by distinguishing the *patterns* in the storytelling that an individual or team has about themselves or others, in which they project themselves or others to a particular type of possibilities. Let's illustrate the point with an example. When we ascribe to ourselves or to a particular startup team a mood of *conviction*, we are saying that we or they have a *pattern of interpreting themselves* - in the domain of their business everyday world - in such way that they always show up as embracing new possibilities that are beyond the average already-available possibilities that everybody else sees or is oriented towards. This pattern can be captured by a set of declarations that define their stance in the world. For instance, that pattern can be characterized with the following structure:

1. I declare that the waste, pain and violence in *such and such* a situation is not a fixed feature of our reality, but something that it is in our hands to change.
2. I declare that neither myself nor anybody else has the answer to this situation, there are unknowns, uncertainties and risks; worse, there are invested interests and misleading discourses and interpretations about critical issues that contribute to stagnation.
3. However, I declare that I have a new theoretical intuition and I will transform myself and lead a new way of thinking, a new approach, and I will enroll a vast and diverse force to overcome this historical obstacle.
4. I declare that I'll change the life and expand the possibilities of millions of people, as well as my own by succeeding in this venture.

The mood of conviction, then, is this habitual pattern that projects the team to reshape its own theoretical foundations, its practical orientation, and to look for changes and innovations that expand historical possibilities. Simultaneously, it closes the possibilities for self-indulgence, justification, resignation or any form of settling into a particular given 'reality'. This is why moods are so critical, because they configure the space of possibilities earlier than reason. Reason rarely can notice that is already playing in an already defined space of possibilities. And it is not a matter of intelligence or IQ. A group of extremely talented people in a mood of resignation, for instance, will only produce more elaborate explanations about the impossibility of doing something. What is missing is not an issue of brain power. It is just that our culture it is not used to dealing with the phenomenon of moods and our management practices are not well equipped to cope with it.

The skill to distinguish and reconstruct moods in a particular world, team or performer is extremely valuable and efficient. It allows us to detect, explore and intervene when a team's



mood is out of sync with their challenges. Assessing moods is probably the first assessment that an experienced business person does when examining an investment prospect. If the mood is dissonant, you know in a matter of minutes that there is something missing, blocking or broken. Even though you may not know what or even have a hint about what it is, you are well oriented and you can look for it. If a particular mood in key roles of a particular Action Workflow process is dissonant with the flow of action, then an intervention to reinstate a harmonious mood is needed.

Finally, it is important to notice that moods are not just subjective, psychological or emotional. Moods are the background music of being that have been shaped and molded along time in a particular networked historical world. Take for instance the mood of *boredom, meaningless activity* and *depression* of the *production lines workers* of the first half of the twentieth century. That boredom is as psychological as it is technological, economical or political. In other words, changing a particular mood and recovering the flow of the workflow, may demand adjustments in multiple layers.

This approach to distinguish, reconstruct and intervene/cultivate moods can be used and refined to explore any mood that shows up as an obstruction or as an enabler to a particular flow of conversations and action. For instance, when you are starting a new challenging project, moods that may damage the work are resignation, skepticism, defensiveness, distrust, naïve hope, boredom, resentment, naïve optimism, or shallow will, among others. On the flip side, enabling moods are often playfulness, resolution, ambition, conviction, serenity, acceptance or trust. Of course, there is no such thing as 'positive' or 'negative' moods in themselves; moods are positive or negative in relation to what you care about.

We are not exhausting the phenomenon of emotions and moods with these few paragraphs. We have more humble ambitions. We just want to lay out a framework to address emotions in a business context, and to create just one access point - distinguishing and ascribing patterns of interpreting possibilities - to support our active agency. There are many other realms to access the phenomenon of emotions and moods - chemistry, physiology, electricity, or artistic languages - that largely transcend our capacities. However, just understanding the historical and linguistic foundation of emotions and moods provides us a solid grounding for design and effective tools to modify problematic emotional habits.

Only 'active agency' can make a difference in 'passive agency'.

Service Processes: Material, Information, Business

Until now we have talked about two dimensions we need to consider in service design: active agency between role identities (conversations we engage with in order to mobilize action) and passive agency (emotional patterns and embodied understanding driving listening, coping with situations and projection to concrete possibilities). Passive agency is our caring. Active agency is our way to address, shape, and cope with what we care about.

However, at this point it is worth noticing that the mobilization of any service never happens in an empty space, but in a hybrid network that links people, technology, and nature among other entities.



If we are a single physician playing in health care services, all of what we do is organized around an Action Workflow in which we promise to deliver a *diagnosis* and a *prescription* that will produce a change in the *health condition* in a defined *lapse of time*. This promise is the core vehicle to take care of the patient. However, in order to deliver that promise, actions travel into and across multiple realms (or phenomenal domains). The patient arrives to a conventional brick-and-mortar private clinic; waits in a ascetic-hygienic-white-couches-screens-and-magazines waiting room. All of which are material, physical components assembled and organized in a particular way. Then a smile brings you a notepad and forms to fill out before your appointment starts in which you write, you mark yes/no options about your health condition, you sign forms that distribute liabilities, and you provide your health insurance number. You basically complete a set of entries to different systems that will provide a representation of you, that will enable tracking of your interplay with the physician, that will enable the execution of possible transactions, among other things.

The same happens for every form of services we examine. The Action Workflow that holds the care/exchange relationship is a hybrid multilayered architecture in which the design of material components (engineering and design), information components (math, logic, patterns and agents), and service components (conversations and exchanges) enable and enhance each other.

The language of *material processes* is mainly developed by scientists and engineers interplaying with nature in their labs. They store components, transport, compare, classify, transform, and assemble new unities, entities and realities in their vast networks of labs. And whatever they do is transformed into the language of *information processes* by mathematicians, statistics and logic. They expand sensitivities to sensor and track action by inscriptions-based metering machines producing data, recording data, discarding data, modeling data, creating metrics, storing data, comparing data, or displaying data. The language of *services processes* is the language of possibilities, contracts and delivery of experiences.

Today, services travel through extended hybrid networks. In the last few decades we have had an explosion of possibilities. SMS emerged about 30 years ago. Overnight delivery, a little over two decades ago. Digital marketplaces, two decades. Forums, customers' communities, two decades. Social relevance algorithms, 17 years ago. Digital exchanges have a bit over ten years. Crowdsourcing, ten years. GPS enabled maps, less than ten years ago. Non-military drones, less than 5 years. But these are only few of the changes that have happened around logistics and communication.

Services are multilayered networks organized around a finite set of concerns, aimed to competitively deliver a particular valuable experience. The Action Workflow is a very powerful tool to orient ourselves to the fundamentals of a service architecture, to shape one of the layers we have mentioned. However, we should not ask it to answer all the questions brought by the hybrids networks that support a service experience.

