



The Operating Model for Intelligent Business Agility

IBA HARMONIQ GUIDE

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Harmoniq

Operating Model

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1. Introduction

In today's context of rapid technological and market evolution, companies must be **agile** and **intelligent** in their use of data and Artificial Intelligence (AI).

The Harmoniq **operating model** is designed to develop **Intelligent Business Agility**¹ (IBA), a holistic approach that integrates traditional business agility with artificial intelligence and **the social-digital dimension**.

Harmoniq's goal is to help organizations become **agile, scalable, and "intelligent,"** capable of responding quickly to market changes by leveraging both people and emerging technologies.

As highlighted in the book *"Networked, Scaled, and Agile: A Design Strategy for Complex"*², there is a fundamental tension between the need for **differentiation/agility** and the need for **integration/scale**, which can be solved through an "artificial" combination of both elements. The authors metaphorically explain this balance through the **"Tower"** (vertical integration) and the **"Square"** (horizontal integration), suggesting that organizational agility is achieved by skilfully combining differentiated organizational elements (small, autonomous, local) with **integrated** elements (large, connected, global).

These aspects are found in **John P. Kotter**³'s *concept of Dual Operating System*, which develops the notion of **dual organization** in which the formal hierarchy is combined with an agile horizontal network to promote innovation and speed: in other words, it combines the classic **vertical organization chart** with a **"horizontal" network** of cross-functional teams that traverse the organization, enabling the flow of value quickly and adaptively.

Harmoniq outlines an operating model that combines **flexibility and integration**, enabling **proactivity** and generating **harmony**, allowing you to combine the advantages of "thinking big" (scale, efficiency) with those of "acting small" (speed, experimentation). The development of a **hybrid organizational architecture** in which a strong **network of autonomous teams** and **lean governance mechanisms** and shared platforms at the company level coexist are fundamental.

A crucial aspect is the **safe and effective inclusion of AI in business processes**: the intensive use of which offers great opportunities in terms of efficiency and innovation, but also poses new challenges.

In particular, the book *"Intelligent Business Agility"*⁴ highlights **three critical points** to be overseen when introducing AI into operational dynamics:

¹ IntelligentBusinessAgility.com

² Networked, Scaled, and Agile: A Design Strategy for Complex Organizations 1st Edition - Amy Kates, Greg Kesler & Michele DiMartino

³ [https://www.researchgate.net/publication/351780042_Kotter's_Dual_Operating_Systems#:~:text=Kotter%20\(2012\)%20takes%20a%20different,the%20design%20&%20implementation%20of%20strategy.](https://www.researchgate.net/publication/351780042_Kotter's_Dual_Operating_Systems#:~:text=Kotter%20(2012)%20takes%20a%20different,the%20design%20&%20implementation%20of%20strategy.)

⁴ Intelligent Business Agility- May 14, 2025 - Felice Pescatore

- *ensuring human oversight over critical decisions*
- *ensure transparency, ethics and trust in AI*
- *Adopt AI gradually while maintaining empirical feedback loops*

1.1.1 Human Supervision and Critical Decisions (Human-in-the-loop)

A first essential point is to ensure that **AI does not take the place of human judgment in critical decisions**. AI should be seen as an empowering tool, not as a complete replacement for people in leadership or decision-making roles.

At Harmoniq, a "human-in-the-loop" *approach is explicitly adopted*: the **last word and final responsibility** always remain with people, who act as supervisors of the activities carried out by the algorithms.

This means, for example, that AI systems can provide recommendations or carry out analysis, but strategic decisions are validated by a human decision-maker.

Linked to this, the model emphasizes the **need for human verification and control** over the outputs produced by AI. *Human Players* have the obligation to check and validate the results generated by *AI Players*, before they are used or operationally implemented.

In fact, *"attention is paid to the risks deriving from delegating too many critical decisions to AI Players without supervision"*. In practice, Harmoniq requires that high-impact decisions always pass through human control, avoiding situations in which an algorithm autonomously makes strategic decisions without a filter of common sense, ethics and context that only human beings can guarantee.

1.1.2 Transparency, Ethics and Trust in AI

The second critical point concerns **trust** in AI solutions, which is built through transparency and ethics.

An AI system that operates as a "*black box*" inaccessible to human control can undermine trust and pose risks of bias or unwanted behavior. This is why Harmoniq adopts the principle that **AI must operate in a transparent, ethical and verifiable way**.

All *players* (human or AI) work in an environment of **total transparency, cooperation and mutual respect for skills**, with trust "designed into the system" from the start. This involves several concrete practices, for example:

- **Traceability and explainability**: The algorithms and data used by AI Players must be accessible and interpretable by human teams, so that it is always possible to understand *why* a certain recommendation or automatic action has been produced. The information and logic of AI do not remain secret, but are shared with human team members (compatibly with technical complexity), promoting informed and conscious autonomy.
- **Cross-validation**: the results provided by AI are always **compared and integrated with human ones**. Harmoniq provides feedback loops in which AI outputs are screened by human

members and combined with their input, so as to mutually improve both the automatic model and human decisions. This approach increases the quality of the solutions while increasing the team's confidence in the AI's suggestions, because they have verified their reliability.

- **Ethics and respect for values:** the use of AI takes place in compliance with shared ethical guidelines. For example, uses of AI that may discriminate or violate privacy are avoided, and metrics are adopted to monitor side effects (such as the CoNI⁵ – *Cost of Not Innovation* – to measure the risk/opportunity of not innovating, balancing project portfolio choices).

By intentionally designing these features, Harmoniq creates an environment where **trust** between human teams and AI systems can grow. Trust, in turn, is a fundamental enabler: only by trusting technology (without blindly relying on it) can people delegate tasks to it effectively.

In the Harmoniq model, "*trust is built into the system*" through open processes, constant communication (e.g. through *Obeya+-style meetings*) and full transparency about data, algorithms and results.

1.1.3 Gradual Adoption and Continuous Feedback

The third key point concerns **how** to introduce AI into daily operations: too rapid and uncontrolled adoption can lead to errors or inefficiencies, while too cautious use can lead to missed opportunities. Harmoniq embraces the "*AI-First*" principle in a **pragmatic and incremental way**.

In practice, the use of AI is encouraged wherever it can bring value, but following a **stepless, experimental and reversible** integration approach. Each new AI Player or AI feature is introduced through **small, controlled experiments**, so you can assess the impact without major risks and backtrack if necessary.

This "start small" philosophy ensures that the organization learns step-by-step how to leverage AI, avoiding traumatic discontinuities.

In addition, Harmoniq emphasizes **empirical feedback loops**: the use of AI must **strengthen** (and not replace) the feedback and continuous improvement mechanisms typical of agile. For example, if an algorithm generates a prediction about customer preferences, this does not eliminate the need to collect real feedback from customers; on the contrary, this AI output can be used as an additional input to be compared with the evidence collected in the field, and then update both human strategies and possibly the AI model (*continuous learning concept*).

In Harmoniq, each planning and review cycle (planning, review, retrospective) considers both human and AI contributions and integrates them. The **obligation for Human Players to verify the output of AI**, which we mentioned earlier, also falls within this context: it is a fundamental control point in the feedback loop.

⁵ Intelligent Business Agility- May 14, 2025 - Felice Pescatore

In summary, the adoption of AI in Harmoniq takes place gradually and methodically: new solutions are tested on a smaller scale, their results are measured (*scientific approach*) and only after validation do they extend to a larger scale.

This ensures on the one hand **that we do not miss the innovation train** (*AI-First principle*: always think if there is an AI option to improve a process), and on the other hand we maintain **control** and the ability to learn from mistakes while avoiding negative impacts on a large scale.

2. Harmoniq

2.1 Dimensions of Intelligent Business Agility

Harmoniq allows you to develop **Intelligent Business Agility** and articulates its action along its **four key dimensions**: three **operational** and a fourth **social-digital**.



Figure 1 - Dimensions of Intelligent Business Agility

The operational dimensions are: **Organizational Agility**, **Market-Fit Agility** and **Technological Agility**, while the central dimension concerns Human + **Artificial Intelligence (HAI Agility)** collaboration.

The **operational dimensions** take up the cornerstones of "classic" Business Agility and concern:

- **Organizational Agility**: the ability to quickly review and adapt the internal **organizational and operating model** to improve efficiency and reduce operational risks. This implies lean structures, flexible processes and a high degree of internal adaptability. In practice, Organizational Agility pushes the company to **reconfigure itself quickly** when necessary, without being entangled in rigid hierarchical or bureaucratic schemes. This concept is reflected in the configuration of **Adhocracy** described by Henry Mintzberg, an organizational structure characterized by dynamism, informality and **low formalization**, capable of adapting quickly to new problems. Unlike traditional bureaucracies, Mintzberg's adhocracy prioritizes **flexibility** and innovation, elements that we find in Harmoniq's approach to organizational agility.
- **Market-Fit Agility**: **Market-focused** agility represents the organization's ability to proactively read market signals and adapt (or reinvent) its product and service offerings to maintain leadership and relevance. In essence, Market-Fit Agility requires the company to be constantly **customer-centric** and innovation-oriented, in order to anticipate customer needs and seize emerging opportunities in time. This also means taking an experimental approach (e.g. with **MVP** - Minimum Viable Product - and rapid prototyping) and

encouraging a constant flow of new ideas. Harmoniq aims for an organization that can continuously evolve its **market fit** with innovative solutions.

- **Technological Agility:** **Technological** agility consists of promoting the adoption and mastery of the most advanced technologies (from automation, to the cloud, to artificial intelligence) to ensure innovation and constant quality in products and processes. This dimension reflects the need **for robust and flexible digital** infrastructures, *DevOps* practices, continuous integration, and a technical culture that values continuous learning. In practice, Technological Agility means being ready to **experiment with new technologies** and quickly incorporate them where they can create value, while avoiding the obsolescence of internal skills. It is one of the pillars for achieving **resilience and speed** of execution, and it integrates with the other dimensions: for example, without adequate technical agility, it becomes difficult to quickly implement market insights or adapt the organizational structure.

In addition to these three "operational" dimensions, there is the **social-digital dimension**, called **HAI Agility (Human + Artificial Intelligence Agility)**. This fourth dimension is what gives the Harmoniq model its "intelligent" character in the proper sense.

It is in fact the organization' **s ability to effectively orchestrate collaboration between people and Artificial Intelligence systems**, creating a network of relationships (socio-digital *networking*) where humans and artificial agents (e.g. intelligent digital assistants) work in synergy.

HAI Agility implies a **company culture that is open** to AI, where leaders and teams do not see technology as a threat but as a lever to enhance human capabilities. In other words, AI is being adopted not to replace people, but to free them from repetitive tasks and enhance their ability to make decisions and create innovation. A key message of the Harmoniq model (and IBA) is that *"artificial intelligence exists to help organizations achieve their goals by unlocking people's potential⁶"*, overcoming old biases that pit humans and machines against each other.

This approach requires **intelligent leadership (Smart Leadership)** and new skills (e.g. **Emotional Intelligence** to manage change) within the company.

Only with a mindset that expertly combines **human and artificial intelligence** is it possible to transform the organization from reactive to truly proactive, capable of anticipating trends instead of being subjected to them.

2.2 Expected benefits

By embracing these four dimensions, the Harmoniq model aims to create **organizations that are ambidextrous** and ready for the future: structures that are robust enough to ensure **scalability and efficiency**, but simultaneously **flexible and decentralized** enough to innovate and adapt quickly.

⁶ Intelligent Business Agility- May 14, 2025 - Felice Pescatore

This closely resembles the aforementioned notion of **dual organization**, coexisting, in fact, both **hierarchical** elements (for ordinary management and process optimization) and **reticular** elements (for continuous innovation, the discovery of new opportunities and rapid strategic redirection).

It is a delicate balance: the top management must learn how *to orchestrate* these two engines, avoiding on the one hand the drift towards disorderly anarchy, and on the other the bottlenecks typical of overly rigid bureaucracies.

In this regard, the classic research of **contingent theory is illuminating**⁷: as early as the 60s, scholars such as Lawrence and Lorsch demonstrated that **there is no single optimal organizational model for all situations**, since the most effective structure *"depends on a series of contingent factors, both internal and external to the organization"*.

In particular, unstable and turbulent environments require **poorly formalized, decentralized organizational charts with high differentiation** between sub-units (but still well **integrated** with each other), as opposed to stable environments where more **rigid, centralized** and standardized structures work better.

The Harmoniq model treasures these contingent principles: it is designed to be **adaptable to the context**, modulating the degree of autonomy of the teams or standardization of processes according to strategic needs and market dynamics. In practice, Harmoniq provides a **flexible framework** within which each enterprise can find its own balance between **local agility** (differentiation) and **global consistency** (integration).

It is worth emphasizing that the first three dimensions of the IBA (Organizational, Market and Technological) are not a revolution compared to the concepts of "traditional" business agility. The real novelty lies in the addition of the **intelligent social-digital** dimension. This reflects the current evolution of organizations that, in order to be agile at scale, must necessarily also become organizations **"augmented" by AI** and data.

In other words, agility is no longer just a matter of lean teams or Lean-Agile methodologies, but also of leveraging algorithms, automation, and networking to make faster, more informed decisions.

Many large companies are moving in this direction: for example, Microsoft, as Kates and colleagues report (again in the aforementioned *Networked, Scaled, and Agile: A Design Strategy for Complex*), has embraced a culture of *"growth mindset"* and encourages its leaders to embrace the "messiness" (disordered complexity) of global ecosystems, willingly accepting polarities (**local autonomy vs. global integration, speed vs scale** etc.) as opportunities for innovation and not as obstacles.

The Harmoniq model embodies this spirit, envisaging organizations that do not eliminate complexity but govern it **through conscious design**: cross-functional teams connected by common platforms, decentralized decision-making but aligned with business objectives, and continuous organizational learning facilitated by feedback loops and experimentation.

⁷ https://en.wikipedia.org/wiki/Contingency_theory

In short, Harmoniq allows *you to design, activate and develop* an **intelligent and agile organization**. The expected benefits include: greater **decision-making speed**, improved **innovative capacity** (thanks to the internal and external network of acquaintances), high **customer focus** (through market-oriented business units) and **operational resilience** (thanks to the adoption of adaptive technologies and practices).

2.3 Basics

To address the risks and opportunities described above, the Harmoniq model is based on a set of explicit **principles** that guide the design of every organizational and behavioral element: **AI-First, Widespread Delegation, Trust, Awareness, and Pragmatism**.

These principles make it possible to develop an **AI-driven but human-centered organization**, where decisions and responsibilities are widespread, supported by trust, awareness and continuous pragmatic adaptation.

These principles form the cultural and operational basis on which we will now graft the actual **organizational structure** of Harmoniq.

2.3.1 AI-First Principle

The **AI-First principle** indicates that, when designing solutions and processes, it is immediately considered **how AI Players can contribute** together with humans to generate innovation, effectiveness and efficiency.

In other words, instead of adding AI as a late thought, the Harmoniq organization *embraces it from the beginning* as an integrated component of the way it operates (in products, services, and decisions).

For example, when designing a new service, it will be evaluated from the conception what activities could be carried out by AI agents (data analysis, automation of parts of the workflow, content generation, etc.) to increase the speed or quality of the result.

However, as discussed, *AI-First* does not mean "*AI Only*" at all.

Harmoniq makes it clear that **AI is an enabling tool, but it does not replace people** in leadership and decision-making roles. Every important decision follows the *human-in-the-loop* approach: AI provides support, but decisions remain under human control.

In addition, AI must operate **in a transparent, ethical, and verifiable manner** within the system (as already pointed out in the previous section).

In practice, the AI-First principle translates into some concrete operational guidelines, already partly mentioned:

- **Continuous oversight:** Every AI solution introduced is closely monitored. Harmoniq envisages that AI **will be supervised and integrated gradually**, through small reversible

experiments, so that its effects can be assessed. You don't launch a critical AI system across the enterprise overnight without a safety net.

- **Improving feedback loops:** AI must enhance empirical learning mechanisms, not replace them. For example, an algorithm that optimizes the distribution of work across teams should be based on agile retrospective data (human feedback) while providing new analytics that teams will use for further adjustments, in a virtuous circle.
- **Verification of AI outputs:** it is an obligation for human players to proactively verify the outputs generated by AI Players, especially at the beginning, so as to identify biases, errors or simple possible improvements in the models.
- **Limits on AI autonomy:** caution is reiterated in delegating **too many critical decisions** to AIs without human supervision. Until AI has proven reliability in a scenario, it is not given full autonomy on irreversible or highly strategic choices. This prudence is built into the model's policies.

In summary, *AI-First* at Harmoniq means leveraging the best of AI at every useful opportunity, but doing so responsibly: AI is seen as **a partner of humans**, not as an entity in its own right. Human and AI *players* work hand in hand, each contributing according to their abilities, towards common goals.

2.3.2 Principle of Widespread Delegation

To respond effectively to the complexity and speed of change, Harmoniq adopts the principle of **Widespread Delegation**. This principle promotes an organization in which **responsibility is distributed** and each actor, human or artificial, can make the best possible contribution thanks to a context that enables it.

In practice, **initiatives and activities are delegated based on competence, capacity and context**, not simply on the basis of hierarchical role. We move from "*command-and-control*" managers to leaders who serve teams (servant leaders), leaving decision-making autonomy at the appropriate lowest level.

What does this imply in day-to-day? Some examples:

- Teams **have decision-making autonomy** on how to implement solutions and organize their work, without having to go back up the hierarchical chain each time. They must obviously align with strategic objectives, but the *way* in which they achieve those targets is entrusted to them. This speeds up reaction times and increases team motivation.
- Traditional **managers change roles**: in the Harmoniq model, line managers become *servant leaders* to support teams, focusing on mentorship, removing impediments and enabling resources, rather than on minute-by-minute control. For example, the manager intervenes only for decisions that cannot be managed at the team level or to facilitate the allocation of resources between teams, but does not micro-manage the daily tasks, which are delegated to the team itself.

- AI Players are also **part of the delegation logic**: tasks of an analytical, predictive or repetitive operational nature are assigned to AI agents under human coordination. This frees up human time for more value-added activities. However, crucially, **critical decisions remain under human responsibility**, although AI players can provide *insights* and analysis to support them. In other words, widespread delegation yes, but *as far as it makes sense*: agents do the heavy lifting on data and automation, humans maintain control over *why* a choice is made.

The principle of widespread delegation also requires that the organization provide teams with the tools and context to act responsibly. It means creating an **enabling environment**, where people (and AI players) have the information and authority to make informed decisions. Harmoniq dedicates an entire integrative layer to the definition of *guardrails* and horizontal processes that allow this controlled autonomy, avoiding both chaos and excessive bureaucracy.

In summary, *Diffuse Delegation* aims to **move decisions as close as possible to the place of information** (i.e. to the teams that have direct context), distributing leadership. This increases agility and responsiveness, and allows each *player* to express their potential to the fullest, feeling ownership of the result.

2.3.3 Principle of Trust

Trust is a founding element of Harmoniq: *all players operate in an environment of transparency, cooperation and respect for each other's abilities: trust is designed into the system.*

Building trust means that every member of the organization can count on others, whether they are colleagues, managers, or AI systems, to act competently and fairly towards common goals.

In a lean-agile and distributed model like Harmoniq, without mutual trust, the autonomy delegated to teams and individuals could not work.

How do you *design* trust in an organizational system? Harmoniq does this through various practices and mechanisms:

- **Collaboration-oriented structures and processes**: Organizational structures (which we'll discuss in detail later) are designed to facilitate *cross-team* and *human-AI collaboration*. For example, each role has clear boundaries but also defined communication interfaces with the others. There are regular times when all players meet to share information and coordinate. In particular, the **Obeya+ is implemented**, a space/ritual of open communication and continuous alignment on the status of the work, deviations from targets, performance indicators and emerging operational problems. Obeya+ (a term borrowed from the Lean world) ensures that isolated "silos" are not created: it is an enlarged corporate forum where transparency and shared responsibility for decisions reign. This type of initiative strengthens trust because everyone knows that nothing important will be hidden from them and that they will in turn be able to express problems or ideas openly.

- **Mutual validation and openness to data:** as mentioned, the outputs of AI players are **always validated and integrated with human ones**. This practice not only improves results, but ensures that human teams have confidence in the work done by AI players (because they have verified its goodness) and vice versa that AI players "trust" human corrections by integrating them into subsequent models. In addition, all relevant information, data, and algorithms are **accessible and interpretable by teams**. This eliminates suspicion and doubt: for example, if a player wants to understand why the recommendation system made a certain choice, they can examine the input data and some explanations of the model. This *internal open data policy* eliminates opacity that would undermine trust.
- **Culture of respect and psychological safety:** Harmoniq actively promotes a culture in which mistakes (human or AI) are addressed constructively. Every moment is seen as an opportunity for learning and continuous improvement, rather than blame. This encourages people to trust in taking calculated risks and to *be supported* by AI without fear, knowing that the organization supports them in innovating.

Ultimately, the principle of trust creates a **virtuous circle**: transparency and collaboration generate trust, which in turn allows for greater delegation and effective collaboration, fueling better performance.

Harmoniq pays a lot of attention to this "*soft*" aspect because it is the glue that holds together all the "*hard*" *elements* (roles, processes, structures) of the model.

2.3.4 Principle of Awareness

Awareness in Harmoniq means that **every decision and action is born from a clear understanding of the context**, the objectives and the overall impact on the system (human and artificial).

In other words, siloed action and local myopia are combated, promoting a systemic vision instead.

Awareness drives responsible, sustainable and continuous improvement-oriented behavior.

This principle translates into several practices:

- **Clarity of purpose ("Start with Why"):** every *player*, human or AI, must be informed about the *reason for* the choices, not just what to do. In practice, leaders always communicate the context and strategic objectives behind a task or project, so that the executor (person or algorithm) can best adapt their actions. For example, a developer, knowing what the expected value is for the end user, will be able to make more aligned daily micro-decisions; Similarly, an optimization algorithm, if "configured" with the right business objectives, will produce more relevant results.
- **Overview and interdependencies: the understanding of** interdependencies **is enhanced**, avoiding isolated actions that generate unexpected side effects. Harmoniq teams are encouraged to communicate with each other (e.g. through Guild+ or cross-meetings) and to use visual tools (e.g. Obeya board) that show the connections between initiatives. In this

way, before making a change or making a decision, the impact on the entire ecosystem is assessed, which includes other teams, customers, and even AI (e.g. impacts on available data). A typical case: if a Squad+ wants to change a product feature, it considers the implications for the other Squad+ (Tribe+) and informs all affected *Chapter+* (e.g., the Security Chapter+ if there are any risks).

- **Data-driven and feedback-based decisions:** Awareness is fueled by the intensive use of **objective data and** empirical feedback in decision-making. Harmoniq promotes the integration of *intuition* and *measurable evidence*: human insights are valuable but must be validated by data, and data alone is not enough without human interpretation. Each decision-making cycle (from the strategic portfolio to the daily meeting) therefore combines quantitative indicators (product, process, AI adoption metrics, etc.) with qualitative observations from teams in the field. This synergy ensures a richer and more multifaceted understanding of reality.
- **Individual and collective accountability:** as widespread awareness increases, **shared responsibility** also grows. When everyone understands the big picture, it becomes natural to feel co-responsible not only for their task but for their overall success. This further strengthens trust and transparency, because people act with the effect of their actions on others and business results in mind.

In summary, the principle of mindfulness aims to **eliminate blinkers** within the organization.

Every member of Harmoniq, from the junior programmer to the AI that makes predictions, "knows what they're doing" in the big picture: they know the end goals, understand how their contribution fits into the puzzle, and what consequences it might have.

This leads to more thoughtful decisions and continuous learning, because you can clearly see causes and effects.

2.3.5 Principle of *Pragmatism*

Last but not least, Harmoniq embraces **Pragmatism**.

In a world of constant change, *what worked yesterday may not work tomorrow*, so tools, processes, and rules **are continually adapted** to support what works best, in an iterative and measurable way. The principle of pragmatism echoes the essence of agile: *inspect & adapt*, experiment small, measure results, and then scale what works.

We do not get attached to methods or tools by taking sides, but we privilege what generates **real value**, eliminating unnecessary complexity and bureaucratic rigidity.

Here's how pragmatism manifests itself in Harmoniq:

- **Continuous improvement for everyone, including AI:** every moment is an opportunity to learn and improve. Not only do human teams do retrospectives: *AI Players are also "trained"*

and improved incrementally. For example, a machine learning model in production is constantly fed new data and its performance monitored; If the model degrades or does not add value, you consider whether to update, replace, or remove it. Similarly, organizational processes (ceremonies, workflows) are periodically reviewed by people to optimize them.

- **Scientific experimentation:** Harmoniq encourages **controlled experimentation** on both human and AI innovations, **comparing the results with a scientific approach**. For example, to improve a business process, you could launch an experiment in which half of the teams use a new scheduling algorithm and the other half keep the manual method: then you measure indicators of efficiency, quality or satisfaction to see which approach works best. This kind of *organizational A/B testing* reflects pragmatism: you don't assume that something new works, you try it small, and you decide based on the data.
- **Adaptability of rules and roles:** If a certain rule doesn't benefit you, Harmoniq provides the flexibility to change it. For example, if you initially decided on a certain meeting format, but the feedback shows that it is ineffective, the format is changed without too many pleasantries. The same goes for roles: there is a clear definition of responsibility (see below), but *the style in which roles operate can vary* depending on the context, as long as the objectives are respected. The motto could be *"we prefer to fix the process, rather than sacrifice the result"*.

In essence, *Pragmatism* means that Harmoniq is a living model, **not a static one**.

It is designed to evolve based on the evidence of what creates value. This avoids stiffening and allows lessons learned to be quickly incorporated, whether they come from human feedback or AI analytics.

The end result is an organization that is always *"on the ball"*, focused on real effectiveness and efficiency.

3. Operating Model

The principles of Harmoniq find concrete application in a series of **organizational and operational elements** that allow the operating model to be effectively implemented.



Figure 2 - Harmoniq Big Picture

Harmoniq was conceived as a **multi-level model**: there is a first layer (*Harmoniq+*) suitable for small to medium-sized or focused organizations, and an extended layer (*Harmoniq ∞*) to scale the model into larger and more complex realities.

In few words:

- **Harmoniq+** introduces the core units: the **Squad+** (small autonomous Human+AI teams with stable leadership), supported by **Chapter+** and **COE+** for skills development and the provision of transversal resources.
- **Harmoniq ∞** extends the model by adding coordination and scaling structures such as **POD+** (Point of Delivery), **Tribe+** and **Guild+**, which are necessary when the company manages multiple complex products/services or different markets. These additional structures allow agility and effectiveness to be maintained even as the organizational size increases, avoiding chaos.

The following figure summarizes the elements of Harmoniq+:



 **HARMONIQ+**
Figure 3 - Harmoniq+

While the next one those of Harmoniq∞:



 **HARMONIQ∞**
Figure 4 - Harmoniq∞

We will now analyze each constituent element of Harmoniq, describing its characteristics, roles involved and functionality.

It will start from the **Squad+**, the fundamental core of the model, then move up to the higher levels (**Tribe+**), to the dual ones (**POD+**) and finally cover the support structures and transversal communities (**Chapter+**, **COE+**, **Guild+**).

3.1 Squad+

The **Squad+** (Squad+) is the basic cell of Harmoniq: a small, **autonomous, multidisciplinary team** geared towards delivering end-to-end value.

In fact, each Squad+ oversees all aspects of a specific solution/product, from design to delivery and operational support.

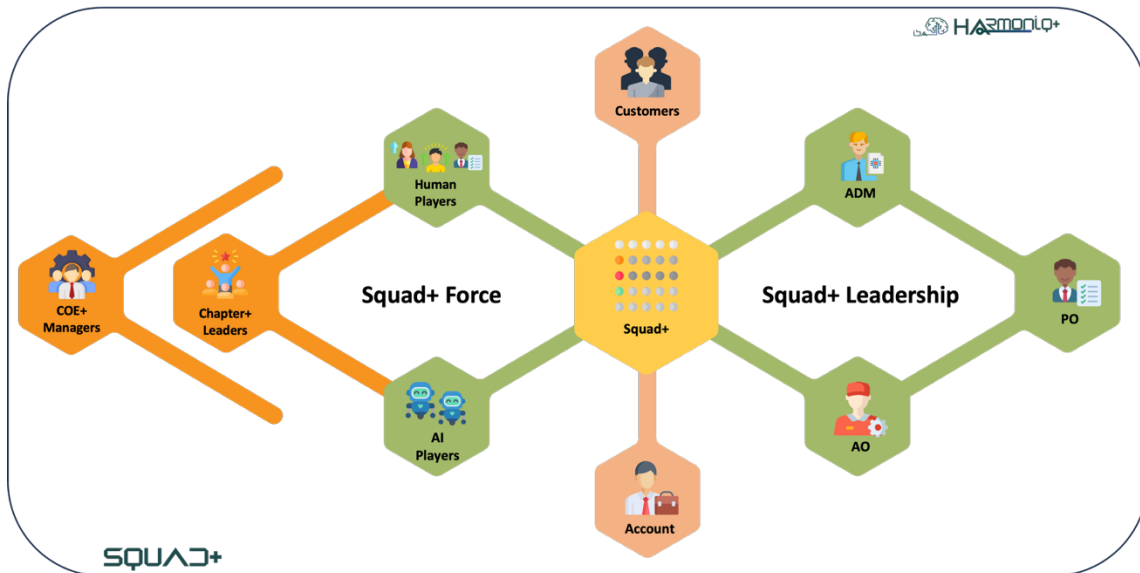


Figure 5 - Squad+ Anatomy

In essence, these are **mini-business units** focused on a clear business objective (e.g. development of a feature, service to a customer segment, etc.), able to work independently using agile methodologies (Scrum, Kanban or similar).

A Squad+ typically consists of **5-8 people** (called *Players*), although there may be variations depending on complexity, and is **persistent** over time on that scope (it is not a temporary project team, but a stable team that evolves the continuous product).

The Squad+ also *constantly "measures and self-improves"* on its results, reflecting the principle of continuous improvement.

A peculiar element of the Squad+ (compared to other agile models, hence the "+" suffix) is that it can include, in addition to human members, also one or more **AI Players** active in the team.

In line with the AI-First principle, *artificial players* are considered to all intents and purposes part of the Squad: for example, a machine learning algorithm could act as a *virtual data analyst*, an AI code generator could support developers, etc. Always, however, as mentioned, **at least one member of the Squad+ must be human** (in addition to leadership) to ensure cognitive and ethical diversity in decisions. In each Squad+ it has a mixed Human+AI composition in which humans hold the ultimate lead.

Internally, a Squad+ features two components: the **Squad+ Leadership** and the **Squad+ Force**.

The Squad+ Leadership is a *triad* of key roles (3 distinct people recommended) who are tasked *with governing* the Squad+ at an operational level, each with a different but complementary perspective.

In Harmoniq, this triad consists of:

- **Product Owner (PO):** responsible for maximizing the value produced by the Squad+, taking care of the functional and business vision of the solution. Defines and communicates the **vision** of the initiative (product/services/etc.), manages and prioritizes the **Initiative Backlog** ensuring alignment with the business strategy, and interfaces with business stakeholders to collect requirements and feedback. In summary, the PO ensures that the Squad+ is building the *right thing* for the customer and the business. (*PO accountability example: Measure the value of released features and iterate the solution based on user feedback.*)
- **Agile Delivery Manager (ADM):** Responsible for productivity and adoption of the agile culture within the Squad+. It can be seen as an evolution of the *Scrum Master*: ADM facilitates workflow, removes obstacles, optimizes processes, and promotes *continuous improvement* of the team. They also coordinate with other Squad+ and stakeholders to align priorities and dependencies. In general, the ADM makes sure that the Squad+ is operating *in the right way*, following methodologies and maintaining a sustainable pace. (*Example: ADM monitors the "health" of the Squad+ and promotes a sustainable and collaborative work environment, intervening if there are overloads or drops in morale.*)
- **Architecture Owner (AO):** responsible for the technical quality and architecture of the solution developed by Squad+. This role, similar to a *Lead Developer* or *Software Architect*, defines **technical standards**, guides architectural choices, and supports developers in solving complex technical problems. It makes sure that the code produced is of high quality, maintainable, secure and well documented. The AO also collaborates with the other AOs of the other Squad+ (via the Chapter+, see below) to disseminate best practices and ensure global technological consistency. (*Example: AO promotes automation of testing and deployment processes to increase the efficiency and quality of releases.*)

This **Squad+ Leadership** therefore represents a mix of skills: *business* (PO), *process* (ADM) and *technology* (AO). It acts collectively to make balanced decisions.

It should be noted that in Harmoniq the leadership is *stable* and in some ways *internal* to the Squad+ (it is not an external "project manager"): this ensures continuity and deep knowledge of the operating context. Leadership style is a combination of *intentional leadership* (spreading vision and goals) and *servant leadership* (removing impediments and empowering the team to work well).

On the other hand, there is the **Squad+ Force**, or the group of specialized *players* who concretely implement the solution.

It typically includes: developers, analysts, UX designers, testers, data scientists, etc., depending on the type of initiative, plus **AI Players** to support

An AI Player can, for example, automatically generate parts of code, perform software tests independently, analyze large amounts of data to find patterns, provide suggestions on backlog priorities, and so on.

Its "mission" is to offer advanced generative and analytical support to the team. AI Players are considered full-fledged members of the Squad+ Force, although *they are always supported and supervised by a reference Human Player* (usually one of the team or technical leadership members). In practice, the AI performs the assigned task but there is a human who checks the outputs and intervenes if necessary.

From the figure it is also noticeable the presence of the **(Sales) the Account**, i.e. the salesman who manages formal, institutional relations with the customer and develops new related opportunities.

In addition, to prevent the autonomy of teams from leading to dispersion of skills or inconsistency in practices, Harmoniq introduces **professional communities** called **Chapter+** and an organizational structure called **COE+** (*Center of Expertise Plus*).

These elements conceptually derive from *Seth Godin's work* in the book "*Tribe*"⁸ and from various field experiments, primarily Spotify⁹ (*Chapter & Guild+*), combined with traditional business functions and adapted to the Human-AI context.

These roles will be detailed below.

In terms of effectiveness and efficiency, the **success factors that** characterize a Squad+ are:

- *Effectiveness*, measured in terms of **outcome** and, therefore, *impact on the business*: customer satisfaction, contribution to business results, speed of value delivery.
- *Efficiency*, evaluated in terms of **output** and, therefore, *operational quality*: sustainable performance of the team, technical quality of the solutions, agility in reacting to changes.

These factors must be balanced to ensure that the Squad+ does not run fast in the wrong direction (very efficient but useless) or produce great strategic value in a chaotic and unsustainable way. Harmoniq provides indicators and ceremonies to monitor both, helping Squad+ maintain the right balance.

In conclusion, the Squad+ represents the "value factory" in Harmoniq: an autonomous, cross-functional and self-organized team, amplified by AI, which **concretely creates products and services** with a focus on the customer. Around it, the model builds support and coordination mechanisms that we see in the following paragraphs.

⁸ Tribe. The world needs a leader like you – Seth Godin

⁹ <https://medium.com/found-ation/agile-team-organization-a-deep-dive-on-the-spotify-model-f5b32dfc37dd>

3.2 Chapter+

A **Chapter+** is a group of *Players* who **share the same professional field/skill** (e.g. a Backend Development Chapter+, a Data Science Chapter+, a UX Design Chapter+, etc.) and who operate within the same COE+.



Figure 6 - Chapter+ Anatomy

Members of a Chapter+ can be distributed into different Squad+ (each engaged in the different initiatives), but the Chapter+ brings them **together in an internal community** where they compare, exchange knowledge and define common standards.

The main objective of the Chapter+ is **to ensure the growth of skills, methodological consistency and operational excellence** in the company for that specific function. Essentially, Chapter+ ensures that developers, data scientists, designers, etc., continue to evolve their skills, adopt shared best practices, and don't "lose touch" with peers in the same discipline while working on product teams.

Each Chapter+ has a **Chapter+ Leader**, an expert in the domain, who leads the Chapter+ community. The Chapter+ Lead (who is often a senior specialist) is responsible for **mentoring members**, organizing moments of sharing (e.g. *Chapter+ periodic meetings* to align standards and practices), and in general ensure that the Chapter+ produces value: enhanced skills, useful standards, mutual support among chapter+ members. The Chapter+ Lead also collaborates with COE+ managers to address training or resource needs.

The success of a Chapter+ is measured on the one hand on **the Outcomes** (the impact on the quality of the solutions and on the company positioning: for example, the ability to introduce new techniques or approaches, the increase in the competitiveness of the offers thanks to the technical level achieved) and on the other hand on the **Outputs** (the vitality of the community, the frequency and quality of shared practices, the growth of internal skills and the recognition by the Squad+ of the value received in daily support).

COE+

The **COE+ (Center of Expertise)** is the organizational entity that brings together one or more related Chapter+ and has the responsibility of managing that area of expertise at the company level in a broad sense. For example, there could be a COE+ "Technology" containing the Chapter+ of development, testing, DevOps, data science; a COE+ "Design & Marketing" with Chapter+ of UX, graphic design, copywriting, etc.

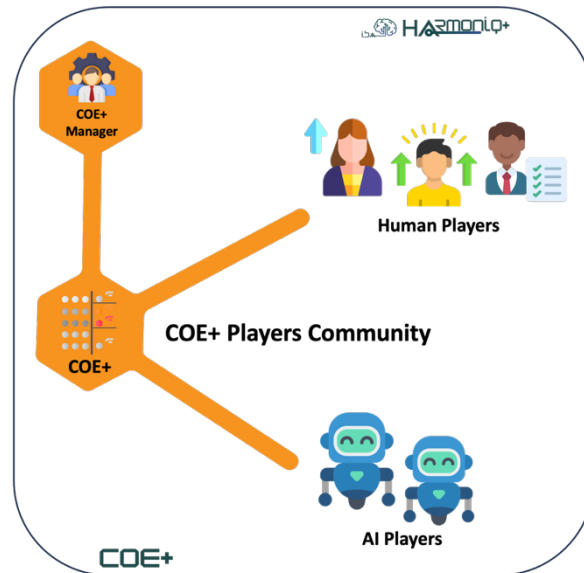


Figure 7 - COE+ Anatomy

The purpose of the COE+ is twofold:

1. **Ensure the availability of expertise and resources** to the different Squad+/Tribe+/POD+ as needed. The COE+ acts as a talent pool: it assigns the right specialists to the various teams (in coordination with the Portfolio and project needs) and can also provide *advisory support* if, for example, a Squad+ temporarily needs an expert on a topic.
2. **Ensure cross-cutting standards and domain innovation.** The COE+ elaborates the **guidelines, frameworks and methodologies** for that professional area, often collecting the outputs of the Chapters. In addition, it takes care of advanced training: it invests in the growth of internal skills (training, certifications) and monitors external technological evolution to introduce new practices in the company. In other words, he is responsible for "*driving operational excellence and the vision of his area*", keeping the company competitive in terms of those skills.

From a hierarchical point of view, each *Human Player* in Harmoniq **formally belongs to a COE+** (its primary area of competence) and has its **direct line manager (COE+ Manager)** there.

The success of a COE+ is measured both in terms of **Outcome** (impact on the organization and contribution to the strategy: e.g. the innovation generated, the improvement of company performance thanks to its initiatives) and **Output** (efficiency in disseminating knowledge and

a small experiment on a new technology in parallel with the official projects, and if the results are promising propose the widest adoption via the COE+ Manager or the Portfolio Manager.

In terms of outputs, the **Guild+** provide *proposals for change, experimentation, "what-if" analysis* and create a connective tissue of knowledge in the organization. They are also a means of nurturing *corporate culture*: Guild+ often deal with values and practices (e.g. a Guild+ *Diversity & Inclusion*, or *Remote Working Best Practices*). Harmoniq sees them as crucial to keeping the company adaptive and innovative, because they give space to collective intelligence beyond formal structures.

For example, thanks to a Guild+ dedicated to generative AI, experiments on a specific tool could be shared between different Squad+ and guidelines on how to best use it in various processes (coding, documentation, marketing, etc.) could be co-created. This would then translate into official guidelines for practical adoption in Squad+, but the initial push and testing phase arise in an informal community where it is easier to innovate without constraints.

In summary, the Guild+ represent the *bottom-up drive* for innovation and continuous improvement at Harmoniq. They are the embodiment of the "*horizontal community*" that Kotter spoke of: they cross the organization creating informal bonds and network of ideas.

Together with the Chapter+/COE+ (more formal), they form the cultural and continuous learning pillar of the model.

3.4 POD+

In the extended **Harmoniq model[∞]** the POD+ (POD Plus), an acronym for Point of Delivery+, makes its appearance.

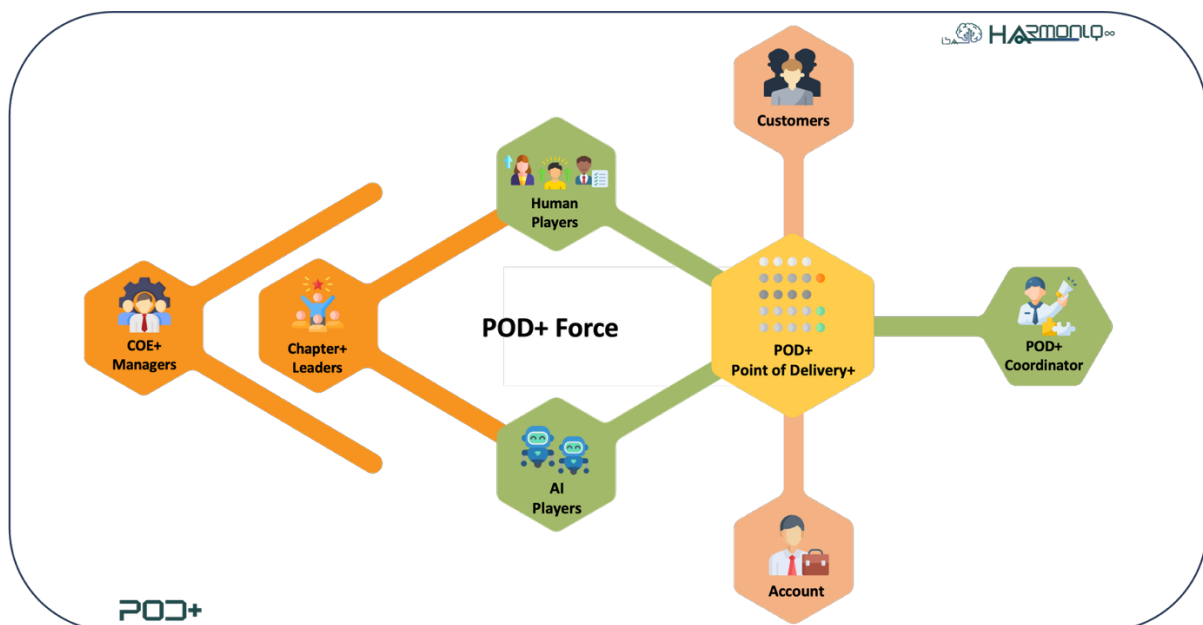


Figure 9 - POD+ Anatomy

A POD+ is a sort of **autonomous micro-unit dedicated to a specific service on a specific market/customer**, typically used to manage *Advisory, professional services or other order activities* not directly related to a single standard product.

We can think of POD+ as a "mini department" focused on a market, customer or service line, which brings together the skills necessary to provide that service in a flexible way.

To give an example, let's imagine a company that, in addition to developing project initiatives, also offers strategic consulting and *time&material* services to some key customers.

These activities, not being product/solution projects, but services, could be organized into one or more **POD+** dedicated to each customer or cluster of customers. POD+ assembles the necessary professionals from different COE+ (e.g. process consultants, data scientists, designers) to serve that customer in a coordinated manner.

POD+ features:

- It has a **defined service perimeter** (e.g. "Advisory Services for Client X") and a set of *Players* operating in it , potentially variable based on the active projects with that client.
- It is **coordinated by a POD+ Coordinator**, a figure similar to the Agile Delivery Manager of Squad+, whose mission is *"to maximize the value of POD+, optimizing its value and capabilities and acting as an interface with Account and Chapter+ Leaders"*. In practice, the POD+ Coordinator manages the allocation of consultants (Players) on POD+ activities, keeps an eye on customer satisfaction (in collaboration with the Sales Account) and ensures that the POD+ achieves the expected results while maintaining quality and efficiency.
- The POD+ Coordinator works closely with the **COE+ Managers** to obtain the necessary resources (human and AI) and with the **Commercial Account** dedicated to the customer to align expectations and seize new opportunities.
- Internal organization: POD+ can be seen as a **service-of-team**, not constraining the exclusivity of its Players.
- In the event that there is a need to "assemble" the services of several POD+ with each other, the approach is to use a **Service Manager** who takes care of the overall coordination, becoming the primary interface to the customer and to the account.

A key point, similar to what is envisaged for the Squad+ and Tribe+, is that even in the POD+ *there must be at least one human element in key positions*. In fact, it is made explicit that the **POD+ Coordinator is always a Human Player** (it cannot be an AI) precisely to ensure ethical and cognitive judgment in allocation choices and in the relationship with the customer.

AI Players can still be part of the POD+, for example an AI agent could be in charge of preparing automatic reports for the customer or data analysis in the context of the Advisory project, under the supervision of the team.

What advantages does the introduction of POD+ offer in practice?

This element allows **Harmoniq to scale towards custom services**: while the Squad+ and Tribe+ cover well the development of standard products or internal solutions, the POD+ manage those more variable and tailor-made activities typical of consulting companies or service divisions.

All while maintaining the agile philosophy: POD+ are also designed to be **autonomous** (within their perimeter), multidisciplinary and customer-oriented, rather than disconnected functional entities. They participate in the agile governance of the company: for example, in the Portfolio Backlog the work of a POD+ is managed in the same way as product initiatives, with priority and monitoring by the Portfolio Steering Committee.

It must be said that not all organizations need POD+: if the company only offers standard products, the Squad/Tribe structure may suffice. POD+ are an *optional* that Harmoniq[∞] makes available in multi-service contexts.

When present, however, they ensure that ad hoc services are also provided with the same discipline and focus on the value of the other components.

3.5 Tribe+

The **Tribe+ (Tribe Plus)** is Harmoniq's structure[∞] designed to **scale developments** while maintaining strategic consistency and coordination across an entire complex product, market or strategic customer.

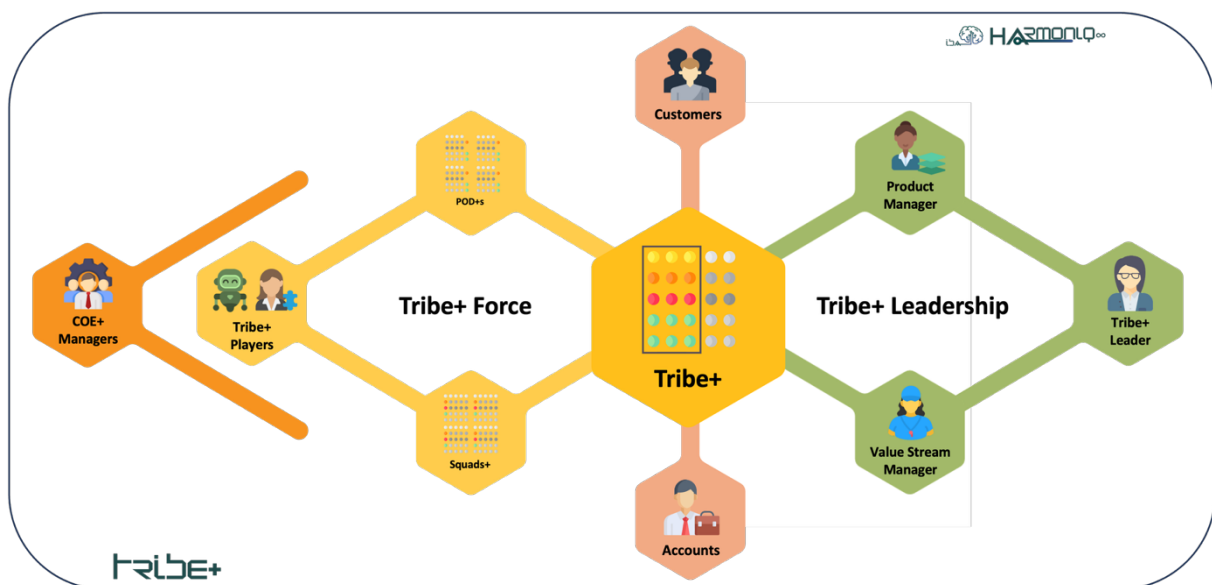


Figure 10 - Tribe+ Anatomy

The focus is on **medium-long term development programs**, thus leading to a broader time vision than Squad+, grouping together a set of Squad+ (and possibly POD+) and *inheriting* the relative support of the attached Chapter+ and COE+.

For example, you could set up a Tribe+ for an *enterprise product* that has several modules (each developed by a Squad+), or a Tribe+ dedicated to the *Finance market* with multiple Squad+ focused

on different solutions for that sector, or even a Tribe+ for a *strategic customer Y* who has several projects underway at the same time with the supplier company.

The logic is similar to the "*Tribes*" of the *Spotify model* but enriched with additional roles and concepts.

The **relative Tribe+ Force** is represented by the set of all the Squad+/POD+ Force that make up the Tribe+, plus any **Tribe+ Players** (resources shared at the Tribe+ level) that operate across them: for example, an *Enterprise Architect* or a *UX Chapter+ Lead* dedicated to that product line.

The **dedicated Tribe+ Leadership**, distinct from the Squad+ Leadership, consists of: a **Tribe+ Leader**, a **Value Stream Manager (VSM)** and a **high-level Product Manager**. This triad at the Tribe+ level has similar responsibilities to the Squad+ triad but on a larger scale:

- The *Tribe+ Leader* is responsible for the overall growth, coordination and success of the Tribe+. It ensures strategic alignment with the business and collaboration between the Squad+, maintaining the continuity of the value produced. In simple words, he is the "mini-CEO" of the Tribe perimeter.
- The *Value Stream Manager (VSM)* is tasked with **maximizing the value stream** across the Tribe+ Squad+, orchestrating priorities, capabilities, and outcomes. Essentially, it plans and balances capacity across Squad+, optimizes end-to-end lead time, and removes cross-team bottlenecks. It monitors flow KPIs (e.g. aggregate throughput, cycle times) and intervenes to improve the overall **Delivery Pipeline**.
- The *Tribe+ Product Manager* (not the Product Owner of the individual Squad+) has the mission of **maximizing the value and adoption of products/solutions in the Tribe+ domain**, ensuring their alignment with the business strategy. He manages the **Tribe+ product portfolio**, orchestrating the POs of the various Squad+ and overseeing aspects such as market positioning, pricing, evolutionary roadmap and overall UX. In practice, he is the one who maintains the integrated product vision and success towards the end customer. (Example of its KPIs: product adoption rate, customer satisfaction - NPS, revenue generated, speed of learning from the market).

From a **governance** perspective, Tribe+ adds layers of **coordination forums**: for example, *periodic Tribe+ Planning* where Tribe+ Squad+ jointly plan the next increment by aligning dependencies, *Tribe+ Review* where they present joint results to stakeholders, and Tribe+ metrics that complement Squad's.

The AI-First concept also applies to Tribe+, with its leadership covered by people, and, in general, at least one *Tribe+ key human player* to ensure ethics and cognitive diversity. AI can support governance (e.g., an AI could help allocate resources or predict project risks at Tribe+ scale, under the supervision of the VSM), but not replace roles of responsibility.

The successes of a Tribe+ are evaluated both in terms of **achieving business objectives** (strategic alignment, end customer satisfaction, competitive time-to-market, ability to innovate) and in terms of **executive efficiency** (autonomy and collaboration between Squad+, people's health, process efficiency). For example, among the KPIs of a Tribe+ you can have: percentage of quarterly OKRs achieved, reduction of critical dependencies between Squad+, improvement of NPS customers of the product, etc...

In conclusion, the **Tribe+** is the mechanism by which Harmoniq scales delivery while maintaining agility: instead of creating functional departments, it creates **semi-autonomous units by product line/market/customer**, each with its own entrepreneurial and results-oriented leadership.

This allows you to have perhaps dozens of Squad+ in the company, but grouped into "archipelagos" (Tribe+) that avoid their dispersion and act as a link towards the overall strategy.

3.6 Metrics and Indicators

Harmoniq encourages a culture strongly based on **measurement** and **transparency of results**, because without shared and interpretable data it becomes difficult to understand if the principles are really adopted and if the model is producing the expected benefits.

Metrics do not have the function of controlling or judging teams, but represent a tool of **collective awareness**, useful for guiding decisions, stimulating continuous improvement and reinforcing mutual trust.

Harmoniq's system of indicators is divided into different dimensions, which reflect the four souls of Intelligent Business Agility: human, organizational, technological and market.

On the one hand, **adoption and collaboration metrics are observed**, on the other, the more traditional technical **and business performance** metrics, up to specific indicators that quantify the ability to innovate.

Among the most distinctive metrics is the **AI Adoption Rate (AIAR)**, which measures the percentage of activities or developments that integrate artificial intelligence components. This indicator is not only quantitative but reflects the organization's ability to incorporate AI in a conscious and distributed way, progressively shifting the frontier of innovation. It is accompanied by the **Player Engagement Index (PEI)**, which takes into account both the involvement of people and the degree of interaction and satisfaction in the use of AI Players. It is an index that reflects motivation, participation and a sense of ownership, fundamental elements for the resilience of teams.

Another relevant metric is the **Data Literacy Index (DLI)**, which indicates the level of maturity of the organization in using data and information in a widespread and responsible way. This index highlights not only the technical skills possessed, but also the ability of teams to interpret data, ask the right questions and use it as a basis for pragmatic decisions.

On the technical quality front, a key indicator is the **Defect Reduction Rate (DRR)**, which measures the reduction of defects over time. Monitoring DRR allows you to understand if development

processes are improving, if the adoption of AI Players in testing and reviews brings concrete benefits, and if Squad+ are consolidating sustainable quality standards.

Other technical and infrastructural indicators include the **System Uptime Percentage (SUP)**, which reflects the reliability of the systems and services provided, the **Adoption Speed for Edge Technologies (ASET)**, which measures the speed with which new frontier technologies are adopted and enter production, and the **Cybersecurity Incident Rate (CIR)**, which quantifies the frequency and severity of safety-related incidents. These KPIs are essential to understand whether the organization can combine innovation with stability, introducing new technologies without compromising reliability and security.

No less important are the metrics on the business side. Here we find consolidated indicators such as **Customer Satisfaction** (or Net Promoter Score), **Time-to-Market**, revenues **generated by new products or services**, and other KPIs of commercial and operational effectiveness. This data, tracked at the Squad+ and Tribe+ level, helps assess the impact of agility on market performance and the economic return of initiatives.

A distinctive element of Harmoniq, from an IBA perspective, is the introduction of the **CoNI (Cost of Not Innovation)** metric. It is an indicator that quantifies the "cost" in terms of lost opportunities when an innovative project is not undertaken. It's a complementary metric to traditional ROI, because it doesn't just look at the expected benefits if successful, but also highlights the implicit risks of inaction. In other words, CoNI helps answer questions such as: *"what do we lose if we don't invest in this innovation?"* tag. This approach broadens the perspective of investment decisions, stimulating leadership to evaluate innovation not as an optional, but as a strategic necessity for the survival and growth of the company.

Overall, Harmoniq's metrics system aims to offer a **balanced view**: on the one hand, the impact on the business and the customer, on the other, organizational health, technical quality, and AI adoption.

This set of indicators is regularly shared in Obeya+ spaces, where it is not used to judge but to foster transparent discussions, informed decisions and collective learning cycles. It is through this constructive use of metrics that Harmoniq transforms measurement into a real engine of awareness and continuous improvement.

4. Value Flow

The **Harmoniq Value Flow** represents the end-to-end path through which an idea is transformed into tangible value for the organization. It is not simply a development or project management process, but a continuous flow that harmoniously combines the upstream decision-making moment with the downstream operational delivery, integrating information and execution activities into a single and consistent cycle.

The essence of this approach lies in the ability to maintain a common thread that binds strategy and operations, objectives and results, hypotheses and validation, without there being any fractures between the different organizational moments.

Unlike other agile frameworks, where the focus is primarily on the delivery phase while initiative selection and outcome measurement remain disconnected, Harmoniq takes a holistic perspective.

The entire lifecycle, from conception to impact verification, is managed within a cohesive Value Flow that allows the organization to quickly align with the needs of the context and to constantly learn from experience. In this sense, Value Flow is the practical embodiment of the principles of pragmatism, awareness and widespread trust that guide Harmoniq.

4.1 Value Flow System

The Harmoniq+/Harmoniq ∞ structures create a model called the **Value Flow System**, which is oriented to the value generated with a specific evil focus.

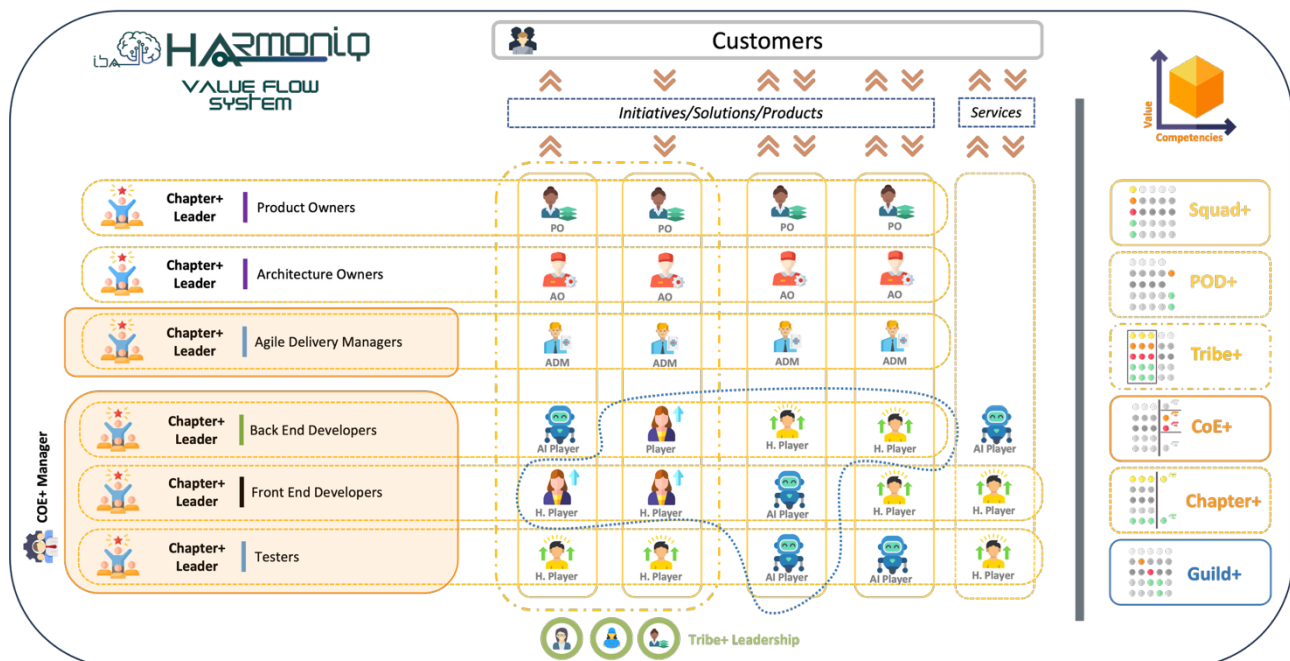


Figure 11 - Value Flow System

In it we have the **COE+ Manager**, as responsible for people (performance evaluation, career growth, etc.), **Chapter+ Leader**, as a facilitator in the growth of skills, and **Squad+ Leadership** as responsible for project work.

This ensures that team members receive both strategic direction on *what/how to grow* (COE+ and Chapter+) and operational direction on *what to do on a daily basis* (Squad+).

Each player, therefore, will be assigned to a reference COE+ with the relative manager as functional manager, will be part of a Chapter+ related to his domain of competence, collaborating with his Chapter+ Leader, and will work daily in the Squad+ "Initiative X" under the guidance of the Squad+ Leadership.

The **COE+ Manager**, therefore, is a key liaison role: he is the head of a COE+ and has the mission of *"driving the operational excellence and vision of his area, structuring it to provide transversal support"*. He manages the human resources aspects (assignments, development plans, workloads) and collaborates with delivery structures (Squad+, Tribe+) to balance capacity.

Dually, the **Chapter+ Leader** is fundamental for connection and professional growth within the organization, leading a homogeneous community of practice and having as its mission to "cultivate the excellence of people and practices, fostering the sharing and alignment of standards".

4.2 The phases of Value Flow

Harmoniq's Value Flow is divided into six fundamental phases, each with a specific purpose but connected in a continuous cycle of learning and adaptation.

- The first phase is **Identification**, where needs, opportunities and signals from the internal and external environment are collected. This can be an innovative idea that emerged from a market observatory, a problem detected by an operations team, or an explicit request from a customer. The important thing is that the organization knows how to intercept these stimuli and channel them into an orderly evaluation process.
- This is followed by the **Evaluation phase**, which represents the moment of analysis and selection. Here a dedicated group, typically a Squad+ Deal & Value, takes charge of the identified opportunity and deepens its contours. The result is a Blueprint, a document that summarizes the vision, the essential requirements, the expected benefits, the estimated costs and the possible criticalities. This Blueprint becomes the basis for subsequent decisions, ensuring that every initiative is based on clear and testable assumptions.
- The third phase is Approval, when the initiative passes to the Portfolio Steering Committee or an equivalent decision-making body. Here the consistency with the strategy, the availability of resources and the sustainability of the investment are assessed. The approval is not just a formal act, but represents the organization's commitment to pursue that initiative with accountability and transparency.
- With the **Selection**, the approved initiative is scheduled and integrated into the workflow. This is done through cadenced planning moments, often carried out in Obeya+ mode, where the different teams and stakeholders align on priorities, skills and dependencies. The

selection ensures that the work to be undertaken is proportionate to the resources available and that there is clear alignment on the objectives for the period.

- We then enter the **Execution** phase, the operational heart of Value Flow. A dedicated Squad+, or a set of coordinated teams, develops the solution iteratively and incrementally. Each partial release is designed as an experiment that allows you to validate hypotheses, collect feedback and measure progress. Execution is never blind, but guided by outcome and output metrics, with constant attention to quality, sustainability and collaboration between people and AI Players. Incremental validation reduces risk and allows you to quickly adapt the route.
- Finally, the **Monitoring & Updating** phase completes the cycle. Here the real impacts are measured with respect to the declared objectives, collecting both quantitative and qualitative data. Based on these results, the initiative can be expanded, corrected or even suspended, with a pragmatic and value-oriented approach. Fundamental in this phase is the circular nature of the flow: what is learned feeds new ideas and opportunities, restarting the cycle with greater awareness.

4.3 Key Roles and Coordination Mechanisms

We have already mentioned many roles in the course of the discussion (PO, ADM, AO, Chapter+ Lead, COE+ Manager, Tribe+ Leader, VSM, Product Manager, POD+ Coordinator, Account, etc.), which it is useful to review jointly from a Value Flow perspective:

- **Product Owner (PO):** Maximize the value of the specific solution they work on. He takes care of the product vision, manages backlogs and stakeholders, measures the value released. (Squad+ Level)
- **Agile Delivery Manager (ADM):** Enables the Lean-Agile culture and flow sustainability in the Squad+. Facilitate continuous improvement, monitor processes and impediments, align with other teams. (Squad+)
- **Architecture Owner (AO):** governs the technical quality and architectural choices in the Squad+. It guarantees standards and automation, supports on technical design. (Squad+ Level)
- **AI Player:** Non-human agent that supports analysis, coding, testing, and decision-making under human supervision. (Squad Level/POD+/Tribe+)
- **Chapter+ Leader:** Guides the growth and consistency of a Chapter+ (professional field) practices. Mentor Chapter+ members, setting standards with them. (Chapter+/COE+ level)
- **COE+ Manager:** Leader of a Center of Expertise. He drives excellence in his area, disseminates best practices and enables cross-functional capabilities for the various Squad+/Tribe+/POD+. (COE+ level)

- **POD+ Coordinator:** Optimizes the value and capacity of a POD+ of services. It interfaces with Sales Accounts and Chapter+ Leaders to manage orders and resources. (POD+ level)
- **Sales Account (Account):** commercial figure who intercepts business opportunities and manages the contractual relationship with the customer. He coordinates offers and contracts in synergy with the Squad+ Deal team and follows customer satisfaction. (Multi-level)
- **Portfolio Manager / Portfolio Steering Committee:** ensure overall strategic alignment. They prioritize initiatives, manage the life cycle of the project/product portfolio, balancing investments and resources. (Corporate Governance)
- **Value Stream Manager (VSM):** Optimize value stream and dependencies at the Tribe+ level, balancing capacity and outcomes across Squad+. (Tribe+ Level)
- **Tribe+ Leader:** responsible for Tribe+ as a whole, he embodies its entrepreneurial and coordinating leadership. (Tribe+ Level)
- **Product Manager:** Strategically responsible for the Tribe+ product set, from concept to adoption, orchestrating Squad+ POs and managing the functionality portfolio with market vision. (Tribe+ Level)

These roles cooperate to keep the "machine" together, but how does cross-level coordination happen?

Harmoniq defines a number of **decision-making and alignment forums**, the most relevant of which are:

- **Portfolio Steering Committee (PSC):** management body that evaluates and approves initiatives (new projects, significant evolutions) proposing priorities based on strategic alignment and available capacity. It typically includes COE+ Managers together with the Portfolio Manager and perhaps representatives of the business. Approves the inclusion of new initiatives in the company's **Portfolio Backlog** and follows their macro progress.
- **Squad+ Deal & Value (D&V):** special squad+ that assesses the feasibility and value of new initiatives, producing a technical-economic *Blueprint*. This comes into play in the initial stages of Value Flow (Identification and Evaluation of Opportunities).
- **Quarter Program Planning / Review:** Quarterly appointments where management (COE+ Managers, Portfolio Managers) meet with Squad+ Leadership and POD+ Coordinators to plan the next quarter's goals and review past ones. This is borrowed from methodologies such as SAFe (PI Planning).
- **Chapter+ Meeting:** Periodic meeting of each Chapter+ to align standards, share practices and experiences, and plan Chapter+ growth activities.

- **Portfolio & Program Review, Execution Sanity Check, Sales Review:** various periodic forums where respectively the status of portfolio initiatives is reviewed, a check is made on the execution in progress (removing impediments or realigning objectives), and alignment on the commercial/sales front. These moments involve key figures (COE+, Portfolio, Sales, Squad+ leads) to avoid drifts and keep the system synchronized.

5. Relationship with other organizational and operational models

Harmoniq is placed in the context of extended and adaptive Lean-Agile methodologies, in line with established concepts in the managerial literature.

For example, *Seth Godin* defines the "**tribe**" as a group of people connected to each other, guided by common goals and based on the ability to find the best contextual organizational and operational balance. This choice has been made several times in large-scale agility, think, for example, of the *Tribe of the Spotify model* and the Agile Trains of SAFe.

Similarly, Henry Mintzberg's *research* and the **contingent approach** underline that there is no single organizational model valid for all companies: the optimal structure must be **adapted to the specific context**.

With this in mind, Harmoniq embraces the idea of Lean-Agile communities (e.g. Squad+ and Tribe+) inspired by these concepts, combining them with principles of widespread delegation, trust and AI-first.

To fully understand Harmoniq, in this section, we will proceed to a comparison with some **classic and contemporary organizational models** and an operational description on how to integrate it and make it the "operational engine" of the most well-known lean-agile scaling frameworks.

5.1 Mintzberg: Organizational Structures and Agility

Henry Mintzberg, with his model of the **five organizational configurations**, has provided a fundamental framework for understanding how companies are structured according to key variables (age, size, environment, technology). Its configurations, from **the Simple Structure** to **the Mechanical Bureaucracy**, from **the Professional Bureaucracy** to the **Divisional Structure**, up to the **Adhocracy**, represent archetypes of organizational design, each with specific strengths and limitations.

The Harmoniq model can be seen as an attempt to intelligently combine some of these archetypes to respond to modern challenges. In particular, Harmoniq tends to privilege the characteristics of **Adhocracy** (flexibility, low formalization, adaptability) because they are those necessary for innovation and speed in turbulent contexts.

Adhocracy, according to Mintzberg, is typical of dynamic organizations where **coordination** occurs mainly through **mutual adaptation** and where the boundaries between roles are fluid, allowing skills to aggregate around the problems to be solved.

This describes many of today's "agile" organizations well (think startups or product development teams in tech companies). However, Mintzberg also noted that such structures are **difficult to scale**: as the organization grows, the need for more formalization and standardization (pushing towards bureaucratic or divisional forms) is likely to emerge.

Harmoniq recognizes this **trade-off** and addresses it by trying to integrate **scalability** mechanisms without stifling agility. In practice, we could say that Harmoniq aspires to create a sort of "**scalable adhocracy**": it maintains agile and innovative cells (similar to internal mini-adhocracies), but connects them through common governance and shared platforms (recalling some elements of professional bureaucracy or divisionalization, such as the standardization of some key competencies or the sharing of centralized services).

For example, a company adopting Harmoniq could have **self-organized teams** dedicated to innovative projects (adhocratic configuration), but at the same time provide **centralized support functions** or **methodological guidelines** common to all teams (introducing standards where needed, as a professional bureaucracy would do, but without excess). In "Mintzbergian" terms, Harmoniq seeks to **tie together islands of creativity** (adhocracies) with a bridge that ensures consistency and exploitation of synergies at the corporate level. This idea refers to the need to **differentiate and integrate** at the same time, a concept to which we will return with the contributions of *Kates et al.*

5.2 Contingent theory: "there is no best model" and the importance of the context

As mentioned, the Harmoniq model implicitly embraces **contingency logic**: that is, it rejects the idea that there is a universal organizational model valid in all circumstances, arguing instead that the ideal structure *depends on* the specific conditions in which the company operates.

This view dates back to the contingent theories of the 1960s and 1970s (from Fiedler to Lawrence & Lorsch), which emphasized the **alignment between organization and environment** as a key factor of effectiveness.

Lawrence and Lorsch, in particular, pointed out that **unstable and uncertain environments** (e.g., innovative markets, high technological competition) require organizations with highly differentiated internal units (each tailored to its specific needs, e.g., divisions oriented to different markets) but also **integrated** with each other just enough to avoid chaos.

Such organizations should be **decentralized and minimally formalized**, so that they can quickly reconfigure themselves. Conversely, **stable** and predictable environments favor centralized, formalized structures with well-defined roles.

The Harmoniq model reflects this philosophy: it provides for organizational **modularity** that allows the degree of decentralization and autonomy to be increased or decreased depending on the context.

For example, a part of the company dedicated to a highly innovative product will be able to operate with the logic of an **internal venture** (a lot of autonomy, experimentation, lean teams), while another part dedicated to more mature and regulated services will be able to adopt more formalized structures to ensure efficiency and compliance. The glue between these different souls will be the shared culture and some transversal mechanisms (e.g. **communities of practice**, integrated

information systems, common rhythms of planning) that ensure that the organization does not break up.

This attention to the specific scenario denotes that Harmoniq is not a rigid scheme, but rather an **adaptive meta-model**: it provides guidelines on how *to design* the organizational structure, but leaves room for different configurations depending on factors such as the target market, the dominant technology, the company size, etc. In this, Harmoniq is very much aligned with the spirit of contingent theories and subsequent developments of **open systems**, where the organization is seen as an *organism* that must continually evolve in response to external pressures.

5.3 Networked, Scaled, and Agile Organization: Insights from the Kates-Kesler-DiMartino Model.

A recent and relevant contribution to framing Harmoniq is given by the work of Amy Kates, Greg Kesler, and Michele DiMartino, who in their text "*Networked, Scaled, and Agile*" (2021) address the dilemma of how to design large but agile organizations.

They identify some **key** tensions that characterize today's companies: the push-and-pull between **local autonomy vs. global scale**, between the need for speed and the need to exploit synergies, between focus on profitable core business and the push towards new innovative initiatives.

The proposed solution is not to choose just one of the poles, but **to embrace both**, managing these tensions as dynamic polarities. In other words, excellent organizations manage to be **bimodal**: *small enough to be agile, big enough to be efficient*. Kates and colleagues suggest that enterprise agility is achieved through an "**artistic combination**" of **organizational elements** that incorporate both **differentiation** (i.e., small, autonomous units, adapted to local needs) and **integration** (i.e., common platforms, sharing of knowledge and resources globally).

In practice, this means, for example, allowing local business units to **make decisions close to the customer** (devolving authority and resources as much as possible to the field) while maintaining some **centralized infrastructures** (such as core technologies, common brands and values, unified processes where needed).

This description is extremely pertinent to Harmoniq: in fact, the Harmoniq model can be seen as the practical implementation of a "*networked & scaled organization*". It involves **decentralized teams** that react quickly to specific needs (local markets, products, innovative projects) – embodying the "differentiated" part – and at the same time defines a **common business layer** (agile governance, shared assets, AI and security guidelines, etc.) that provides economies of scale and consistency – embodying the "integrated" part.

One aspect that Kates et al. insist on is that companies must *accept the inevitable tensions* and even use them to their advantage: a truly agile organization on a large scale does not seek to eliminate any conflict between local units and centralization, but creates mechanisms for better ideas and greater value to arise from these contrasts.

For example, the tension between global vs local can be managed through **light matrix structures** or **transversal networks**: Kates proposes the idea of a "**lateral organisation**", made up of cross-functional teams and community networks, which overcomes internal hierarchical boundaries to achieve both agility and scale.

Here too we find a parallel with Harmoniq: the HAI Agility dimension of Harmoniq, with its focus on social and digital networking, in fact builds a **lateral organization** that connects people and knowledge through AI and collaborative platforms. This facilitates the rapid composition of **cross-functional teams** to solve problems or seize opportunities, without breaking the formal structure but overlapping it. In addition, Kates and Kesler talk about the importance of **activating multiple levers** beyond structure in the strict sense: e.g., lean processes, flexible budgeting mechanisms, innovation incentives, etc., as part of an integrated system to support agility.

Harmoniq is also in tune with this aspect: in the model, **Agile Governance** (indicated for example in the previous figure) provides for approaches such as **adaptive portfolio management** and **dynamic budgeting**, i.e. flexible project portfolio management and incremental funding, elements that go beyond the pure organizational chart and invest the **managerial culture**.

We can therefore say that Harmoniq is **consistent with the most advanced trends in the agile organization**: it is based on the idea of a **networked company**, with the ability **to scale** without losing adaptability (*scaled and agile*). However, where Harmoniq seems to go further is in emphasizing the role of **artificial intelligence as an integral part of the operating model**.

This does not appear explicitly in Kates/Kesler/DiMartino (whose focus is more on traditional organizational aspects, such as structure, processes, skills). Harmoniq, on the other hand, integrates AI as an organizational design factor from the beginning, recognizing that in the fourth industrial revolution, **cognitive technology** changes the paradigms of work organization. In this, Harmoniq anticipates a possible evolution of Kates et al.'s models: we can imagine that a next frontier is the definition of how organizational networks include **artificial agents** (bots, autonomous systems) as active "members" of business processes. Harmoniq, with its HAI dimension, already lays the foundations for this, proposing a **man-machine pact** within the company.

5.4 Other relevant organizational models and contributions.

In addition to the aforementioned Mintzberg, contingent theory and networked organizations, the Harmoniq model also calls to mind other well-known approaches. One of these is certainly **Galbraith's Star Model**, a classic organizational design framework based on 5 poles (Strategy, Structure, Processes, People, Rewards): Harmoniq touches on several of these elements (the underlying strategy is intelligent agility, the structure is hybrid network/hierarchy, processes are lean, people equipped with new skills, etc.), suggesting systemic alignment.

Another reference can be **Laloux's concept of Teal Organization** (where self-organization and evolutionariness are maximum), although Harmoniq maintains a clearer role for strategic leadership and technology than the Teal model strongly centered on culture and self-management.

Again, we find affinities with **General Stanley McChrystal's "Team of Teams"**: the latter **emphasizes the importance of connecting small autonomous teams through shared purpose and continuous exchanges of information**, exactly what Harmoniq proposes through **socio-digital networking and agile governance**.

Ultimately, Harmoniq was not born in a theoretical vacuum: it is rather a **synthesizer** of many established ideas in the modern business organization, from flexible structures to adaptive systems. Its peculiarity is to combine them into an **integrated operating model** and explicitly place them in the era of artificial intelligence.

5.5 Integration with Disciplined Agile (DA)

Disciplined Agile (DA) is a **methodological toolkit** rather than a rigid framework.

Unlike specific methodologies such as *Scrum*, DA does not prescribe a fixed set of roles or ceremonies, but provides a **catalog of strategies, principles, and best practices** to combine based on context. In essence, Disciplined Agile *"works as a toolbox from which to extract the most appropriate scaling strategies"* for your situation.

It is a **hybrid** approach that incorporates elements of Scrum, Kanban, Lean, XP, governance models etc., offering guidance to adapt the process to the project and organization. A sentence that sums up the difference well: *"Disciplined Agile... offers a flexible and context-driven approach, adaptable to different situations and needs"*.

In fact, AD practitioners appreciate **personalization: the "context-counts" principle is privileged**, or "depends on the context". For example, DA offers multiple lifecycles (Agile Basic, Agile Continuous Delivery, Lean, Exploratory, etc.) and allows you to choose DevOps, governance, teamwork practices, based on the level of discipline needed.

In terms of organizational structure, Disciplined Agile does not impose a precise scaling scheme (unlike, for example, SAFe, there is no predefined "dual team/program level" to be adopted). Rather, DA provides guidelines on how **to evolve nimbly**: for example, it suggests starting with well-functioning agile teams and then scaling up by adding layers of coordination only when necessary.

One of the key principles of DA is in fact *"context matters"* : each team is unique and must adopt practices appropriate to its situation, with pragmatism and flexibility.

This context-oriented and *conscious choice approach* closely resembles Mintzberg's contingent approach already mentioned, and provides an ideal complement to the Harmoniq principles.

In fact, you could adopt Harmoniq as a high-level reference for your operating model (e.g. defining that you want self-organizing teams, decentralized decisions, use of AI in processes, etc.), and then Disciplined Agile to choose the practical tools with which to achieve these goals in each department.

In other words, DA can be like **a toolbox** for Harmoniq that offers the "agile" options to combine to build that bespoke agile-intelligent organization.

It is important to note that DA, being a product of the SME (Project Management Institute) in recent years, also emphasizes strategic alignment and **Business Agility** at the enterprise level, introducing concepts such as the **Disciplined Agile Enterprise**.

This alignment with Business Agility means including aspects of culture, structure, end-to-end processes, elements that overlap well with the dimensions of Harmoniq.

5.6 SAFe integration

SAFe (Scaled Agile Framework) is probably the most well-known and widely adopted agile scaling framework globally, especially in large IT organizations.

Unlike Disciplined Agile, SAFe provides a **detailed, prescriptive model** for implementing agility across multiple teams, programs, and portfolios.

As well summarized by several experts, *"SAFe was born to help large enterprises implement agile practices in a structured way. It provides clear guidelines and defined processes, making it easier for organizations to extend agile across all teams."*

In practice, SAFe introduces **specific roles** (e.g. *Release Train Engineer, Product Manager, Solution Architect*, etc.), **programmatic ceremonies** (e.g. IP Planning every 8-12 weeks to align all teams of an Agile Release Train) and a layered structure (Team, Program/ART, Large Solution, Portfolio) that covers the entire enterprise.

It is like a "**recipe book**" where all the steps are clearly indicated: this can be reassuring and useful in complex organizations looking for a uniform approach.

In terms of purpose, SAFe is not limited to software delivery but aims at overall **Business Agility**, integrating Lean and Systems Thinking principles to link agile development with business strategy. In particular, the aspects of **Customer-Centricity, Agile Product Delivery, Lean Portfolio Management**, explicitly highlight the need to involve non-IT business functions in the agile journey.

All of this means that SAFe and Harmoniq have common ground: they both talk about enterprise agility. In fact, SAFe's definition of Business Agility is fully in line with Harmoniq's objectives.

SAFe could be used within a Harmoniq model to manage one part of the organization – for example, the *product development* function, while other parts might adopt different variants.

A concrete example: imagine a large manufacturing company adopting Harmoniq. For the software development and digital solutions part, it could decide to implement SAFe (to benefit from the clear structure in the management of dozens of teams of developers, synchronization by release, etc.).

At the same time, for the strategic innovation and R&D part it could use more fluid approaches (such as Lean Startups or internal incubators not pigeonholed in SAFe), and for the traditional operations part it could maintain classic functional structures but made more agile by Lean practices.

The **Harmoniq government** would be on top of orchestrating these differences: for example, a Harmoniq-style Adaptive Portfolio Management could include both SAFe Value Streams and exploration projects outside SAFe, allocating budgets dynamically according to market evolution. In other words, Harmoniq would provide the "*meta-framework*" within which SAFe is one of the possible subsystems to achieve agility in a specific area.

In many respects, Harmoniq and SAFe are **aligned in concepts**, and Harmoniq can be implemented by overlaying it on top of the existing SAFe framework. For example, you can establish the following correspondences between Harmoniq and SAFe elements:

- **Tribe+**: corresponds to a **SAFe Agile Release Train**, i.e. a set of teams (50–150 people) focused on a common value (product or business value). A Tribe+ Harmoniq, in fact, is designed to focus on a single complex product or strategic market segment, scaling developments in that area. In Harmoniq, **Tribe+ Leadership** includes roles such as the *Tribe+ Leader*, the **Value Stream Manager** and the **Product Manager**: figures similar to the roles of *Release Train Engineer/Coach* and *Product Manager* who lead an ART in SAFe, ensuring coordination and strategic alignment of the group of teams.
- **Squad+**: equivalent to an **Agile Team** of SAFe, i.e. a cross-functional agile team (about 5–9 members) working on specific **features**. Each Harmoniq Squad+ is self-contained and full-stack (including both Human and AI Players in the team) and follows agile practices similar to those of a SAFe team (which can use Scrum or Kanban at the team level). SAFe requires built-in quality and strict definition of "Done" at every level, principles that a Squad+ can adopt while also leveraging the assistance of **AI Players** to improve efficiency and analysis, while maintaining quality standards and human oversight.
- **POD+ (Point of Delivery)**: comparable to a **Feature Group** or a **team of components** within an ART SAFe, or it can be seen as an intermediate **Value Stream**. POD+ serves as an operational coordination point between teams working on closely related components of a product, ensuring that dependencies are managed and value is released in an integrated manner. In SAFe, similarly, there are coordination mechanisms between teams (e.g. *scrum of scrums* or *feature teams*) to ensure that interdependent features converge on every PI. Harmoniq formalizes this layer with the POD+ concept, facilitating integration with **SAFe's** value stream **and** feature logic.
- **Guild+**: This corresponds to the **Communities of Practice** that often emerge in Agile organizations (although not explicitly prescribed by SAFe). This idea can coexist in a SAFe context as voluntary communities to spread knowledge and shared standards between different ARTs. At SAFe, the importance of **technical alignment and sharing of best practices** is recognized (e.g. through Chapter+ or inter-team centers of excellence), and the adoption of Guild+ Harmoniq can enrich the SAFe framework by adding a formal space for innovation and cross-functional collaboration.

- **Cultural principles:** Harmoniq's core values (widespread delegation, trust, pragmatism, awareness, AI-first approach) complement and enhance SAFe's Lean-Agile values and principles. For example, SAFe emphasizes **transparency** and **decentralization of decision-making** to foster alignment and intrinsic motivation of knowledge workers. Harmoniq reinforces these aspects by pushing them further: "trust designed into the system" means creating mechanisms (such as **Obeya+** and Big Room-style synchronization moments) in which all actors, human and non-human, share information openly, similar to how SAFe requires visibility of progress and continuous *inspect & adapt*. The **widespread delegation** in Harmoniq is consistent with the SAFe principle of *decentralizing decisions* (making decisions as close as possible to where you have the information), and the judicious use of AI in operational roles can increase feedback velocity and empiricism without sacrificing human governance. In short, Harmoniq can be seen as an **additional layer** that brings *additional agility and modernity* to SAFe: it retains SAFe's structural clarity and discipline for scalability, but adds innovative elements (**tribal team-inspired** organization, Human+AI integration, Guild+, etc.) and encourages more *contingent* adaptation to the specific context of the company, avoiding applying SAFe in a rigid or "one-size-fits-all" way.

In conclusion, an organization that already uses SAFe can **integrate Harmoniq** to enrich its operating model: maintaining SAFe's **ceremonies and structures** (PI Planning, ART, Portfolio) but redefining internal roles and cultures according to Harmoniq (e.g. managers as *servant leaders* supporting Squad+/POD+, using **AI agents** as data-driven decision support, etc.).

Conversely, an organization born with Harmoniq can introduce SAFe components to manage planning and coordination at scale, for example by using PI Planning and quarterly cadences to synchronize Tribe+ on strategic objectives.

Thanks to conceptual compatibility, Harmoniq and SAFe together can offer both **structure** and **flexibility**, ensuring strategic alignment and governance **on the one hand**, and **local adaptability and continuous innovation** within teams on the other. This combined approach fully reflects the philosophy that *"there is no single winning model, but each organization must design its own"*, treasuring both codified best practices (SAFe) and the ability to dynamically adapt them to its context (Harmoniq, in a contingent and agile spirit).

5.7 Synergies

To conclude, the exploration of the Harmoniq model in the light of **Mintzberg's contributions, contingent theory, networked-scaled models** and **DA/SAFe frameworks** gives us a **rich and complete** picture.

Harmoniq is a **forward-looking approach**, which amalgamates classical theories (no effective organization without adaptation to the context) and modern practices (widespread agility, team of teams, collaborative AI).

The comparison with DA and SAFe shows that Harmoniq **is not in conflict** with the latter, on the contrary it can incorporate their useful elements: from **the structural discipline** of SAFe to the **versatility** of DA. Ultimately, an organization that adopts Harmoniq will have the advantage of having a **complete concept map** to navigate agile transformation, knowing that they can tap into different compasses (frameworks) depending on which course to take at any given time.

Harmoniq does not require dogmatic loyalty to a framework, rather it encourages the result: an agile, intelligent, fast and effective company. If for a certain organization following SAFe to the letter contributes to that result (because it brings discipline in execution and strategic alignment), then SAFe is *the right tool in that context*. If another organization thrives better with a DA-style tailor-made approach (because local culture rewards autonomy and continuous experimentation with new practices), then DA is preferable there.

The important thing, as always, is to keep the **final goal** clear: to achieve a level of **Intelligent Business Agility** that thrives in today's context, where, to paraphrase a concept already mentioned, *"the only certainty is that tomorrow's world will be different from anything we have seen before"¹⁰*.

With Harmoniq, companies are gearing up to embrace this uncertain future with confidence, turning agility and intelligence into parts of their organizational DNA.

¹⁰ FelicePescatore.it

Appendix I

Essential glossary

- **IBA:** Intelligent Business Agility (agility + data intelligence/AI).
- **Squad+:** Human+AI cross-functional autonomous team on a value stream.
- **PO/ADM/AO: Squad** + leadership (value/flow/architecture-quality).
- **AI Player:** Non-human agent with human perimeter and supervision.
- **Chapter+:** community for homogeneous competence.
- **COE+:** Center of Excellence/Cross-Cutting Enablement.
- **Guild+:** transversal voluntary community on a theme.
- **POD+:** units for focused services/orders.
- **Tribe+:** grouping of Squad+/POD+ on product/market/customer.
- **VSM/PM (Tribe+):** End-to-end flow / Tribe product portfolio.
- **Blueprint:** Assessment/feasibility document.
- **Obeya+:** space/ritual of alignment and visual decision.
- **CoNI:** Cost of Not Innovation.

Synthetic templates

Blueprint (excerpt)

- *Why/Purpose, Expected Outcomes, Hypotheses and Metrics*
- *MVP and non-objective scopes*
- *Minimal Architecture & Risks*
- *Cost/capacity & hi-level timeline*
- *Guardrail (security/compliance/data)*
- *Validation and rollback plan*

Dashboard KPIs (Squad+ view)

- Outcome: Adoption, NPS/CSAT, Estimated/Realized Value
- Flow: lead time, throughput, freq. release, MTTR
- Quality: production defects, test coverage, incident rate
- Team: IEP, capacity vs load, turnover/holidays
- AI: AIAR, acceptance rate output AI, error rate

Adoption Checklist

For Leadership

- Clear sponsorship of principles and guardrails
- Defined decision rights (widespread delegation)
- OKRs and CoNI in the Portfolio
- Decision SLAs and WIP throttling

- Company Obeya active

For Squad+

- Named and enabled PO/ADM/AO triad
- Clear backlog and DoR/DoD
- Minimal automation pipelines (build/test/deploy)
- Visible KPI dashboard
- Regular Retro and Kaizen

For AI

- Signed HITL & data governance policies
- Use cases mapped by risk/value
- Onboarding AI Player (pilot to HITL prod)
- Logging, explainability, fallback
- Periodic review (drift, safety, compliance)

6. Conclusion

In conclusion, Harmoniq presents itself as a complete operating model that concretizes the principles of Intelligent Business Agility.

It combines *organizational agility* (autonomous teams, decentralized decisions, continuous adaptability) with *widespread artificial intelligence* (AI integrated into processes and teams, supporting humans) in a coherent and balanced framework.

We have seen how Harmoniq systematically addresses the **risks of AI-human interaction**: it keeps humans in the *loop* on every critical decision, builds trust through transparency and verification, and gradually adopts AI experimentally. At the same time, it capitalizes on the **opportunities of AI** by applying an "AI-First" principle that stimulates innovation in every area.

The **Squad+**, **Tribe+**, **POD+** structure allows you to scale agility across the enterprise without losing focus on the customer and value. **Chapter+** and **Guild+** ensure that knowledge and people grow with the organization, avoiding silos and stagnation.

Multiple **key roles** and **governance forums** orchestrate the whole, ensuring strategic alignment and cultural cohesion.

In an era where digital transformation poses unprecedented challenges, the Harmoniq model offers a viable "*guide*" to achieve agility, efficiency, and continuous innovation.

It is not a static model: on the contrary, it itself embodies the principle of pragmatism and continuous improvement, adapting to the context of the individual company that adopts it. Implementing Harmoniq means embarking on a path of organizational evolution, in which **humans and artificial intelligences work in harmony** (*harmoniously*, hence the name) to generate extraordinary business results in a sustainable and shared way.

Like any initial guide, what has been described provides the theoretical and practical foundations: the next challenge is to bring these concepts into the daily reality of the organization, customizing them where necessary but without betraying its spirit.

The journey to Intelligent Business Agility is challenging, but with Harmoniq as their operating model, companies can have a detailed map to navigate it successfully.



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