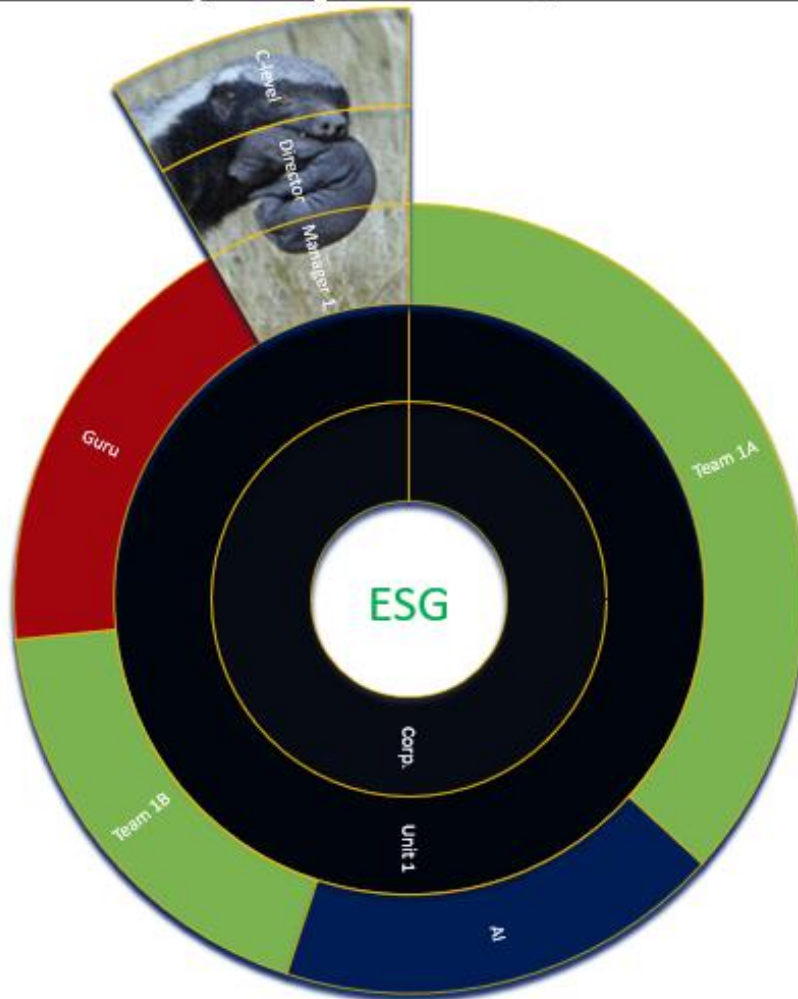


# HONEY BADGER MANAGEMENT FRAMEWORK

AI Assistants & Leadership compatible, ESG Compliant, Agile

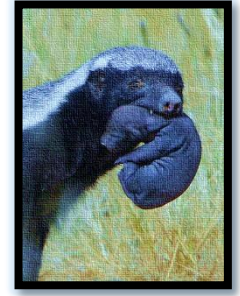
*by Georgios Fradelos, PhD*



Leadership | Agility | AI | ESG

Version 1.4, 2024

# THE HONEY BADGER GUIDE



AGILE MANAGEMENT FRAMEWORK

FOR PROJECTS & ORGANIZATIONS

ARTIFICIAL INTELLIGENCE ASSISTANTS & LEADERSHIP COMPATIBLE

IMPACT INVESTING & ESG COMPLIANT

*Since February 2023*

VERSION 1.4

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## A. INTRODUCTION

The Honey Badger Guide version 1.4, since February 2023, is a pioneering agile management framework compatible with Artificial Intelligence (AI) assistants, designed to revolutionize project and organizational management. Authored by Georgios Fradelos, PhD, this guide introduces a resilient and adaptable system that integrates AI assistants, emphasizes leadership, and aligns with impact investing and ESG compliance. It addresses traditional agile management shortcomings, offering a structured yet flexible approach to enhance team performance and ensure effective collaboration across the entire organization. Honey Badger is a future-proof solution for a dynamic business environment, symbolizing strength and adaptability in the face of challenges in the uncharted waters of market volatility, technological advancements and regulatory changes.

In this guide, we discuss the shortcomings of other management methods and the advantages of the Honey Badger. We also describe the components of the framework and the different roles of team and organization members and AI assistants. Information flow principles, decision-making rules, compliance, and scenarios conclude the guide.

With Honey Badger, experience a structured yet agile approach to management that propels your teams and the whole organization and as well as external stakeholders, towards success. Dive into a framework that symbolizes resilience and adaptability, ensuring your projects thrive in the face of any challenge. Choose Honey Badger for a future-proof management solution.

## B. HONEY BADGER IN A NUTSHELL

The existing agile frameworks have several shortcomings that we discuss bellow. Honey Badger, the A.I. assistants and leadership compatible, agile, ESG and Impact Investing compliant management framework is a better option. In short and without using proprietary terminology, the system works as follows.

- The organizations are composed of top management, small-size, partially self-organized, managed teams, an A.I. assistant for knowledge related tasks -with no decision-making authority- and other optional A.I. tools
- All, including the top management use the A.I. assistant
- Extra-team shareholders submit requests for a product or service to a team
- The manager, a leader, has the final word in the design and assignment of the tasks, the team motivation, the overall responsibility and makes the presentations
- There are two competing sub-teams of specialists inside the team
- The specialists have a lot of self-organization freedom but they are not calling all the shots
- A team member assists everyone with the PM system, has several administrative duties, has the power to issue red flags to all team members including the manager and can submit notes about framework compliance to the top management
- The aforementioned employee can serve more than one teams
- The tasks are decomposed to the maximum and executed in very short cycles that can be cancelled

- Intra-team knowledge transfer and respect for the tranquility of team members are obligatory
- Knowledge transfer between members of different teams is formalized (who and when must or can ask for help across the organization)
- Humbleness is imposed via the obligatory declaration of knowledge gaps
- There are time constraints and other limitations and in addition formal communication events
- Vagueness is minimized via definition of “easy”, “difficult” and “done”, the tasks and roles are clear and realistic. The AI assistants help not exclusively, with the understanding of where the project stands. Honey Badger is a complete management system for the entire organization and not a set of ideas for inspiration or a toolbox
- Honey Badger is Impact Investing and ESG compliant and respects the role of the leaders

## C. MOTIVATION - ISSUES ADDRESSED BY THE FRAMEWORK

The agile project management frameworks are a significant step forward but there are a number of problems that led to Agile 2 and other efforts. To name a few:

- Many organizations are not willing to change the job titles or cancel managerial level jobs and give considerable independence to teams to become truly agile
- Effective decision making by groups of technology professionals of mixed seniority level, on an almost daily basis without supervision is not an easy task and can be incorrect or slow or lead to lack of planning and orientation
- The optional stakeholder involvement often leads to no involvement; the soft pressure of encouragement of communication between team members can be perceived as no obligation
- The minimum duration of sprints is confused with removal of the option to cancel the sprints based on the business case
- The perturbation by the A.I. assistants is not taken into account
- The value of an A.I. assistant for knowledge and not for calculations is not identified
- The asymmetry of the expertise of the team members and the pressure for rapid delivery can lead to path of the minimum resistance team orientation incompatible with the true project goals
- To the best of our knowledge, all technological breakthroughs in the history of humanity were the fruit of supervised teams (building the cathedrals in Europe ...). The absence of a supervisor and 100% reliance on a method is experimental in nature

- The respect of the tranquility of the co-workers in order to promote concentration is not encouraged or parametrized
- Declaring levels of difficulty of the knowledge needed for the task is not attempted
- No ways proposed to formally encourage knowledge sharing between internal or external team members and between teams and other stakeholders outside of the formal meetings
- The product design and the implementation, which are critical elements are left to group responsibility which is vague
- Intra-team competitiveness is not linked to structural elements of the agile frameworks
- The good psychology of the team is not specifically promoted
- The existing agile frameworks, most often need to be heavily modified to be used outside of the Technology space and they are not a standalone management system

The above issues are addressed by the framework described here-in

## D. INTRODUCING THE HONEY BADGER

Honey Badger, the A.I. Compatible, Agile, Management Framework relies on new and traditional, objects, procedures, roles and events that we will call elements herein, to overcome the limitations of the existing project management frameworks, including their questionable compatibility with Artificial Intelligence assistants. The name Honey Badger symbolizes surprising survivability under any odds and in the face of diverse challenges, based on key adaptations. The Honey Badger project teams survive in general and not only against a few specific types of challenges. An agile mindset is obligatory. The framework can be applied to teams producing measurable results and organizations.

Compatibility: All fast-paced technology and consulting companies, academic research groups, open to the use of A.I. assistants with minimum team size of 6 including the Manager. Large scaling, multiple teams or the whole organization. Impact investing and ESG compliant

Elements/keywords: Short Sprints, Specialists, Guru, Manager, older brother, younger brother, extra-team knowledge transfer, dashboard update frequency, A.I. assistant integration, *narrow field special strength, daily stand-up, short sprint preparatory meeting, sprint cycle, dashboard snapshots*

## E. PHILOSOPHY - PRINCIPLES

1. Be agile, work in iterations, but do not risk non-stop group decisions, because knowledge is also a key focus; have a Manager, assign clearly defined sub-roles and accept the continuous learning part of your work
2. Create down to earth teams that are requested to communicate, by declaring some of your weaknesses
3. Decompose the problem as much as you can for the work to fit Short Sprints
4. Do Short Sprints for reasonable tasks, be ready to cancel the sprint if needed and you will never lose all your resources. Short Sprint duration: 1 week, max 3 Short Sprints per month
5. Integrate A.I. assistants to your team and they will not replace you if your work is not trivial
6. Respect the A.I. assistants for knowledge much more than A.I. assistants for calculations if you wish to innovate
7. Ask for help as much as it is allowed by the rules but be prepared for a rejection for any good reason. Respect the tranquility of your co-workers
8. With the combination of an A.I. assistant, self-learning and imposed human to human knowledge transfer, obtaining the knowledge is seen as a “certainty”. Imagination, thinking out of the box, speed and stamina are the challenges
9. Individuals must know at least some of the ways via which they are supervised
10. The management frameworks are not only an inspiration but valuable methods and tools

11. The A.I. compatible frameworks must be periodically updated as a reaction to technological advances
12. Value the discipline of following a few rules (ex. frequency of updates of the project dashboard) when exploring brand new ground
13. Teams of specialists and managers need both assistance and guidance; events addressing the aforementioned must be part of the workflow
14. If you only follow exactly some of the rules of the Honey Badger guide you do not do Honey Badger
15. Keep the top management informed not only about the progress of the work but also about the framework compliance

## F. TEAMS



Team size 6 or 8 or 12 individuals plus 1 optional but strongly desirable Artificial Intelligence assistant. The A.I. assistant must be strictly 1 for quick and transparent reproducibility and easy determination of its contribution. The A.I. assistant can also be used by all decision makers in the organization

1. **The Specialists** -developers, analysts, professionals having expertise in a field which does not coincide with knowledge profile of the majority (for example an accountant working with an IT team to produce accounting software)
  - i. They *develop* the technology or *deliver* the service
  - ii. They provide *input to the Guru and the Manager* when requested
  - iii. They belong to 2 Sub-Teams; *the two Sub-Teams compete for task completion speed and they are rewarded or penalized by the Manager*
  - iv. The Sub-Teams are self-organizing and can be cross-functional
  - v. At the beginning of each Short Sprint each Specialist, the *younger brother, Specialist* must declare 1 piece of knowledge for which they would like help or a second opinion (due to lack of recent practice or other) by another

Specialist the *older brother*, from the second day of the Short Sprint for a maximum 1 hour per day at a fixed time and at an open space; the Guru must be able to get an impression of the quality of the session from a distance while for example working on the dashboard

- vi. Each Specialist can submit a suggested 2 requests per Short Sprint for *second hand assistance* by the Manager or the Guru; these requests can be rejected for any reason (e.g., lack of time or expertise)
- vii. Each Specialist must declare 1 narrow field special strength (e.g., a software library, a secondary software programming language, a business analysis model, a mathematical technique) and the strengths can overlap or be identical
- viii. The *A.I. assistant is integrated in the Sub-Teams* and can receive an infinite number of requests for assistance
- ix. The testing is done continuously by the Sub-teams
- x. The specialists communicate the status of each subtask to the Guru and anything else judged important

## **2. The Guru** –obliged to be permanently busy

- i. Teaches the team about the framework
- ii. Ensures that the framework is followed by the Specialists
- iii. Monitors *framework related measurables*
- iv. Can submit framework related requests to all Team Members -who must comply
- v. Can submit framework related requests to all other Gurus for the case of multiple teams who are not obliged to comply

- vi. Can submit *framework related requests* to the whole hierarchy of the organization
- vii. Monitors the team continuously and issues *warnings* to the Specialists who do not follow the framework; after 2 warnings, sends asap a *note* to the Manager
- viii. Organizes and chairs the communication events and takes notes
- ix. Updates daily a physical *dashboard* designed by the Manager and presenting: the tasks, completed, in testing, in progress, not started, the velocity of the progress of the team and the Sub-Teams of Specialists, the *MVP1 (minimum viable product or service No1; herein by product is meant product or service)*, *MVP2*, the *warnings*, the *flags*, the events, the *uncertainty*, the *difficulty*, the *milestones* and anything else the Manager judges necessary inside the limits of the agile management culture to date
- x. Is available to provide feedback about any framework related matter to the Manager
- xi. Systematically informs the manager about the progress reports received by the Specialists
- xii. If the Guru receives a request for assistance by a Specialist and cannot assist at all, transfers the request to another team if any
- xiii. Can use the A.I. assistant for any reason including familiarization with subjects, revision, fast calculation without coding
- xiv. The Guru audits at an intermediate level the communication by the Specialists
- xv. The Guru handles the backlog

- xvi. The Guru can be member of multiple teams in the same general field, but in that case cannot offer as much extra assistance to the Specialists mentioned in this framework
- xvii. The Guru comforts the team(s)
- xviii. The Guru can flag and report the manager and higher level management to the top management for framework related compliance issues only

### 3. The Manager -the Manager is also the product owner and has authority

- i. Sets the *product requirements* influenced by analysis done together with other members of the hierarchy or the team
- ii. Decomposes the product to the maximum even number of subproducts=tasks requiring 7 working days = 1 Short Sprint, max 3 Short Sprints per month
- iii. Groups the tasks in 2 families based on interdependencies
- iv. *Declares the MVP1, MVP2, MVP3; these MVPs can be influenced by analysis done together with other members of the hierarchy or the team*
- v. Designs the *dashboard*; the dashboard design stays unchanged for 6 days after the first day but the values can change at any moment
- vi. *Evaluates the resources* as often as needed, at least once per Short Sprint and takes all necessary intra-team and extra-team communication action
- vii. *Decides about rewards and penalties*
- viii. Assigns the variables that appear on the dashboard (difficulty, uncertainty) and communicates the updates to the Guru
- ix. Ensures that the Guru is working

- x. Can use the A.I. assistant for any reason including familiarization with subjects, revision, fast calculation without coding, researching existing solutions for the same task with all possible implications
- xi. The Director authorizes the A.I. assistant and if this is not applicable, the Manager does it
- xii. Determines the testing tasks
- xiii. Presents the results to any extra-team stakeholders
- xiv. Asks other managers for assistance and requests data from the client as applicable
- xv. Gives direction and motivation to the team
- xvi. Is lower in the hierarchy than the Guru for framework compliance matters

## G. COMMUNICATIONS

### 1. Communication Events

- i. *Project initiation/* Request for product feature or service from extra-team stakeholders to the Honey Badger team's Manager after discussing the business case. Duration: 240 minutes max. The longest communication event to remind to everyone the value of the business case
- ii. *A Daily Standup/* an output only session from the second day of each Short Sprint. All Team Members participate. The Specialists state what they recently did, what they are doing and what they will do and any impediments or significant success. The Guru states if the framework is followed good enough. The Manager listens. Duration: 20 minutes max
- iii. *Short Sprint preparatory meeting/* the whole team and some extra-team stakeholders (clients, managers, directors) brainstorm on the requirements. The extra-team individuals leave the meeting room and the Manager assigns the sub-Team Members and takes some private time to finalize the tasks. The Sub-Teams vote for the tasks and the sprint starts immediately. The meeting for the first Short Sprint has a more pronounced preparatory style. Duration: 180 minutes max
- iv. *Extraordinary session/* 1 per Short Sprint; the Manager informs the whole team about something new and significant or requests specific information. A Short Sprint can be interrupted after such a session but this must be rare. Duration: 180 minutes max

- v. *Post Short Sprint Team Session*/ the whole team discusses the problems and the progress and how Honey Badger can be better executed (e.g. the milestone is reached, a Specialist declared inaccurately a narrow field special strength, the Manager inaccurately assigned the difficulty level of 1 task, the daily standup was too short, etc). Same format for the last sprint of the Cycle. Signals the end of the Sprint Cycle. Duration: 120 minutes max
- vi. *Presentations by the Manager*/ to extra-team internal and/or external stakeholders at any moment and most often after the sprint cycle; discussing product features or consulting recommendations. Duration: as needed

Note: presentations of new, creative ideas by Team Members must take place during the relevant Communication Events

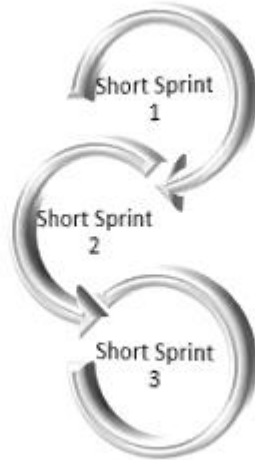
## **2. Sample subjects compatible with requests for assistance**

- i. An integrated development environment
- ii. A software library
- iii. A numerical technique
- iv. A business analysis framework
- v. A small overview of a field, for example a programmer who never traded stocks but is working on a relevant task can receive an overview by an older brother; a second example: a consultant, member of a team submitting proposals for adoption of agility to the client organization can receive information about aspects of the business of the client if needed
- vi. The A.I. assistant can be used for partial confirmation

## H. HONEY BADGER IN ACTION

	WORK, A.I. ASSISTANT AND ROLE INITIATION AT HONEY BADGER EVENTS				
	PROJECT INITIATION	SHORT SPRINT PREPARATORY MEETING	START OF FIRST SHORT SPRINT	POST SHORT SPRINT TEAM SESSION	AFTER THE POST SHORT SPRINT TEAM SESSION
PHASE	Request for product feature or service from extra-team stakeholders to the Honey Badger team’s Manager	The team brainstorms and afterwards the Manager assigns the sub-Team Members and the tasks	Working on the tasks	The whole team discusses the problems and the progress and how Honey Badger can be better executed	Presentation by the Manager if requested
WORK INITIATION		Manager, Guru	Specialists		
COMMUNICATION INITIATION	Extra-team shareholders , Manager	Team Members	Extra-team communication		
KNOWLEDGE TRANSFER INITIATION			Internal, external		
A.I. ASSISTANT ACTIVATION		Activated for all			
SUPERVISOR ROLE INITIATION		Guru (for Honey Badger practice)	Manager		Extra-team stakeholders except if needed earlier

## A Honey Badger Sprint Cycle



- 
1. 3 Short Sprints maximum are a sprint cycle at the end of which at least 1 MVP must be ready
  2. The first day of each sprint is seen as set up day as the design of the dash board can be changed
  3. The last sprint is dedicated at least at 50% to the merging of the 2 families of subproducts and the testing; the older brother younger brother pool is merged
  4. The same Sub-Team works either on tasks that belong to the same conceptual group or on completely new tasks

## I. THE DASHBOARD

1. Is updated max 3 times per day starting on the second day of the sprint
2. Snapshots are taken by the Guru and they are available to the whole organization (C-level has access and can be informed and inspired)
3. What is done, easy or difficult (in addition to custom flags) appears on the dashboard and at a glance higher level management can understand if the project goes uphill or downhill

## J. DECISION MAKING, TEAM LEVEL, C-LEVEL

1. If a first or second Short Sprint needs to be cancelled because new information became available, it is interrupted immediately and the preparation for a new Short Sprint or Cycle starts immediately
2. A Sprint Cycle should be extended rarely by 33% if needed but not cancelled after the second Short Sprint. If it gets cancelled it must be a rare event
3. If a Sub-Team is completely blocked an extraordinary event must be called
4. If a Sub-Team provides inaccurate reports of progress to the Guru an extraordinary event must be called
5. If a Sub-Team is behind schedule the Manager and/or the Guru can assist using 15% of his/her time; if still the task is not completed by end of Short Sprint the work is continued in the following Short Sprint before the new tasks are attempted; the Manager decides on sub-team and team composition changes
6. The Manager evaluates the performance of all other Team Members and is responsible for the MVPs. Sends progress reports to the Director after each Short Sprint
7. The Manager evaluates the resources and negotiates the allocation of additional resources with the Director after having sent the report. If there is a surplus it is discussed and resources are eventually liberated
8. The Guru evaluates the reporting by the Specialists and is obliged, if everything else fails to inform a Director or the higher management if the manager or a Director overlooks the PM framework

9. The Director is not easily surprised thanks to the Dashboard Snapshots. The same goes for the top management
10. The Manager can exercise a doubly weighted vote for the case of 2 membered Sub-Teams
11. The definition of done, easy and difficult (anything ambiguous is classified as difficult) is decided by the Manager after having discussed with the rest of the team and all available stakeholders
12. The Sub-Teams decide which work they prefer to do, how to do it, their schedule
13. All team members decide what kind of assistance they need and this decision is not audited
14. The Guru is the supreme authority in Honey Badger matters in the Team
15. Managers, Directors and C-Level Officers can request input from internal, cross-functional, temporary or not, consulting teams applying the Honey Badger framework. The input assists the decision making and can be: market research, business plans, segmentation analysis, competitive analysis, SWOT, etc.

## K. ADVANTAGES

1. Risk is mitigated thanks to the Short Sprints
2. Healthy intra-team competition is introduced
3. Humbleness is promoted via the obligatory declaration of weaknesses
4. Intra-organization knowledge resources are used to the max
5. The organization consciously learns to co-exist with Artificial Intelligence
6. The framework is agile and there are no ambiguous abstract tasks that cannot be monitored
7. Monitoring is maximized
8. Communication between teams is increased as the Guru and the Manager can reach other teams for some assistance
9. Following the framework is promoted by the ability of the Guru to report the manager to the Director in exceptional cases
10. The framework benefits from scaling due to the knowledge transfer between teams
11. Understanding the realistic value of knowledge in the evolving A.I. era is promoted
12. Decisions for business case viability are much easier thanks to the Dashboard Snapshots
13. Honey Badger time constraints present some elasticity but this is treated as rare event
14. Honey Badger promotes decomposition of tasks and decisions and strives to remove abstract concepts that can be misunderstood by the team members
15. Honey Badger makes individuals and teams accountable but sees A.I. as a tool
16. Impact Investing and ESG compliance

## L. HONEY BADGER SHIELDS

How the teams and the organization is protected from failure

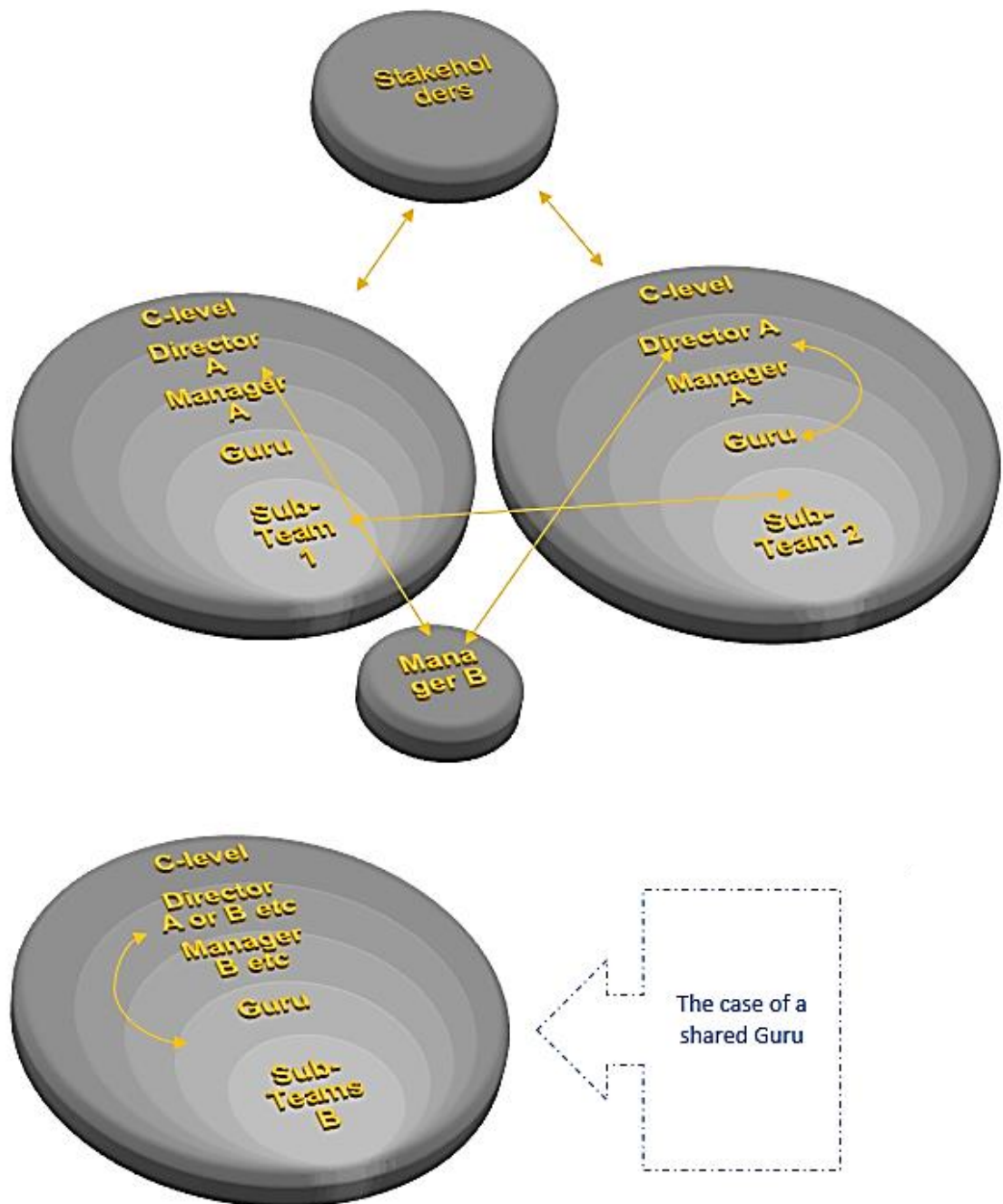
1. Failure if it occurs is fast as the sprints are short and you can quickly re-evaluate
2. The work is done in an environment of mutual assistance and humbleness by framework design
3. Everyone is agile and prepared that agreed work can be cancelled and is fine with this as the new work will require similar or identical knowledge; a small setback time-wise
4. No risk of chaotic time-loss via continuous voting. There is a manager who takes some considerable responsibility
5. The daily stand-up that is outgoing information only, minimal stress
6. All stakeholders have access to a steady flow of information via communication events and dashboards
7. There are two intra-team progress monitoring members, the Guru and the Manager and this confusion and overshooting becomes less possible
8. The team is encouraged to partially rely on A.I. assistants and receives a direct hint that the value of knowledge progressively decreases and the value of speed, originality and imagination increases. The Honey Badger teams and organizations work on competitive product and services
9. The Guru has the power to report to the top-level management, for framework compliance issues, even the high level management and that way everyone understands that the framework must be applied

## M. IMPACT INVESTING AND ESG COMPLIANCE

1. By integrating AI assistants for specifically selected tasks, today or tomorrow energy consumption will be reduced
2. Diversity and social well-being are promoted by obligatory declaration of knowledge weaknesses promoting humbleness. Steps to ensure a healthy psychology in an organization promote sustainability
3. Transparency is supported by obligatory frequent communications and the aforementioned declaration of knowledge weaknesses
4. The medium and high-level management is in check by some employees (Gurus) for one topic (the application of the PM methodology)
5. In most cases the energy consumption of an AI assistant is lower than that of a human and Honey Badger presses for the use of IT where possible
6. An organization using the Honey Badger is using a core sustainable tool, the AI assistant that gets updated systematically and if needed can be replaced by another

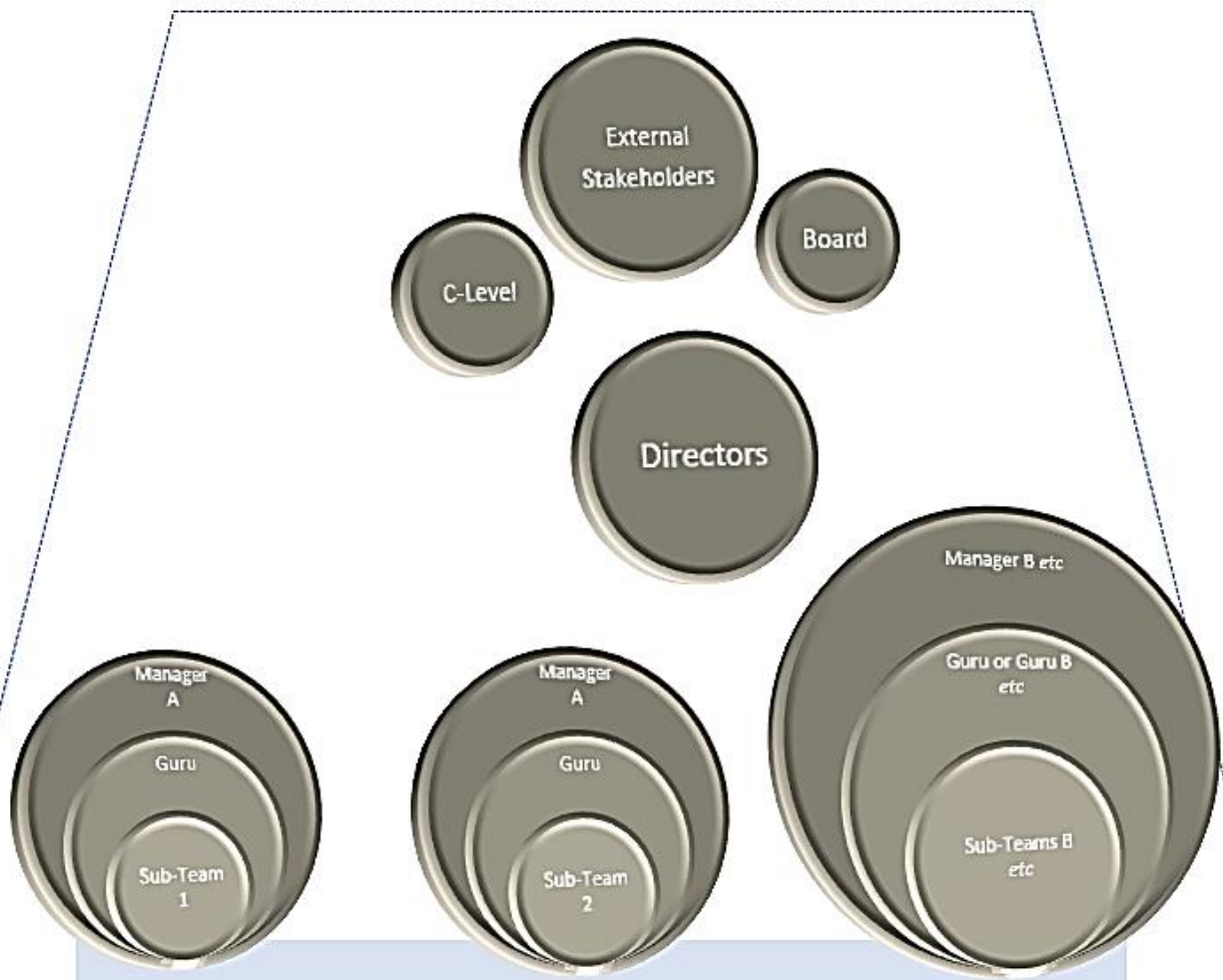
## N. SUMMARY OF INFORMATION FLOW

The information flows for all purposes from the small circle to the next bigger one; the arrows indicate additional channels. Everyone in the organization has access to the A.I. assistant.



## SCALED HONEY BADGER FRAMEWORK

The different sizes of the Team circles indicate the option for Sub-Teams, in different teams with higher or lower number of Specialists. All stakeholders are assisted by the Artificial Intelligence Assistant



**Artificial Intelligence Assistant: Acts As Support for All Stakeholders**

## O. COMPARISON WITH PMP, PRINCE2, SCRUM, AGILE2

The Honey Badger Guide is an AI-compatible agile management framework that offers a unique approach to team dynamics, AI integration, and compliance with Impact Investing and ESG. It emphasizes flexibility, adaptability, and knowledge sharing within teams, and includes roles such as the Guru and Manager to ensure framework compliance and effective communication.

Here's how it compares to other management methodologies:

### **PRINCE2:**

Structure vs. Flexibility: PRINCE2 is known for its structured approach, while Honey Badger offers more flexibility.

AI Integration: Honey Badger integrates AI assistants, unlike PRINCE2.

Compliance: Honey Badger is ESG compliant, suitable for projects with sustainability goals.

Team Dynamics: Encourages intra-team competition, unlike the role-focused PRINCE2.

Scaling: Honey Badger scales massively by construction thanks to the information flow and the sharing of the Gurus between teams.

## **PMP Certification:**

Framework vs. Certification: Honey Badger is a framework, while PMP is a certification. Honey Badger is a complete management system for the entire organization, not a toolbox and at the same time does not exclude the use of external tools.

AI assistant integration: The Honey Badger explicitly integrates AI assistants.

Agility: The Honey Badger system is strictly agile with teams ready to pivot to satisfy the business case.

Scaling: as above.

## **Agile 2:**

Remote Collaboration: Honey Badger supports remote teams as needed with AI tools and structured communication (see next section).

Framework Compliance: A designated guru monitors compliance, which may not be present in Agile 2.

Scaling: as above.

Clear instructions: the Honey Badger respects provides clear instructions; it does not ask for hit and miss compromises. The Honey Badger is a framework not a set of ideas.

## **Scrum:**

AI Integration: Honey Badger includes AI assistants, which Scrum does not standardize.

Team Structure: Offers a unique team structure with specialized roles.

Leadership: the Honey Badger respects the role of a leader/manager avoiding the confusion that scrum created which led to the Agile 2 movement.

Scaling: as above.

Clear instructions: the Honey Badger provides clear instructions; it does not hope that empiricism will somehow lead to a competitive solution. The Honey Badger is a framework not a set of ideas.

Honey Badger is ideal for projects requiring AI assistant integration, optimized information flow and ESG compliance.

## P. LEADERSHIP

Leadership plays a crucial role in the Honey Badger agile management framework<sup>1</sup>. Here are some key points regarding leadership within this framework:

**Manager's Role:** The Manager is responsible for setting product requirements, decomposing tasks, and ensuring the team follows the framework. They also have the authority to assign tasks, evaluate resources, and make decisions regarding rewards and penalties<sup>2</sup>.

**Guru's Responsibilities:** The Guru teaches the team about the framework, ensures compliance, monitors progress, and can issue warnings or report to higher management for framework-related issues<sup>3</sup>.

**Team Dynamics:** Leadership is distributed among the Manager and the Guru, with the Manager focusing on product and task management, while the Guru ensures adherence to the framework's principles.

**Decision Making:** The Manager has a significant role in decision-making processes, including evaluating performance, resource allocation, and defining the 'done' criteria for tasks. The guru has the power to decide if all team members follow the framework including the manager.

**Top management:** The C-level officers and the Directors maintain their traditional roles with the addition of a channel of communication about framework compliance via the Guru(s)

Leadership within the Honey Badger framework is designed to promote agility, accountability, and effective knowledge transfer, while also integrating AI assistance and maintaining ESG compliance. The Manager and Guru work together to guide the team towards successful project completion.

## Q. REMOTE/HYBRID TEAM MEMBERS OR TEAMS

When some team members are working remotely and when a full team(s) is remote, Honey Badger offers some key points:

**AI assistant Integration:** Teams include an AI assistant for knowledge-related tasks, which can support remote collaboration.

**Communication:** Structured communication events and frequent updates are essential, which is crucial for remote team coordination.

**Team Structure:** Small, partially self-organized teams with clear roles and responsibilities, adaptable to remote settings.

**Knowledge Sharing:** Formalized intra-team and extra-team knowledge transfer, important for maintaining information flow and team spirit in remote teams. It is a process that makes all feel included.

These principles aim to ensure efficient management, positive team psychology that promotes productivity and collaboration.

## R. ORGANIZATION-WIDE ACCESS TO ESSENTIAL INFORMATION

The Honey Badger framework promotes access to essential information through the following key features:

**AI Integration:** It includes an AI assistant for knowledge-related tasks, accessible to all team members, enhancing information flow.

**Knowledge Transfer:** Formalized intra-team and extra-team knowledge transfer is mandated, ensuring expertise sharing across the organization.

**Dashboard Updates:** A physical dashboard updated daily by the Guru provides a clear view of project status, facilitating transparency.

**Communication Events:** Structured communication events and meetings are designed to share updates and discuss progress, promoting informed decision-making.

## S. THE FINANCIAL IMPACT OF THE HONEY BADGER

### MANAGEMENT FRAMEWORK

Better management methods in combination with the individual talents of the leaders increase the profitability of organizations. The Honey Badger brings access to the best and most modern management methods and that make continuous adaptation to change possible.

Companies can experience significant increases in profitability following a change in management. This is often due to implementing strategic shifts, operational improvements, or cultural changes that better align with market demands and opportunities.

For instance, a study by Innosight, known as the Transformation 20, identified global companies that achieved the most impactful business transformations over the past decade. These transformations were measured by new growth, repositioning of the core business, and financial performance. A notable example from this study is Danish Oil and Natural Gas, which faced a financial crisis in 2012. The appointment of a new CEO, Henrik Poulsen, led to a fundamental change in strategy, moving away from fossil fuels towards renewable energy, which resulted in a significant turnaround for the company (ref: <https://hbr.org/2019/09/the-top-20-business-transformations-of-the-last-decade>). Honey Badger as it accelerates the insights thanks to the short sprints, the communication flow and the structural use of AI assistants can lead to comparable successes.

Moreover, McKinsey & Company highlights that assessing a company's long-term performance after a management change involves looking beyond short-term financial metrics. It involves evaluating the company's ability to sustain its performance and build profitable businesses in the future (Ref: <https://www.mckinsey.com/capabilities/strategy-and-corporate-finance/our-insights/measuring-long-term-performance>). This comprehensive assessment can reveal the true impact of management changes on a company's profitability and value creation. Honey Badger has sustainability at its core as it employs sustainable IT assets (AI assistants), promotes positive team psychology and creates the base for energy consumption reduction.

These examples underscore the potential for management changes to drive profitability and long-term success. However, it's important to note that the outcome of such changes can vary widely depending on the specific circumstances and actions taken by the management team.

## T. SUMMARY OF THE HONEY BADGER LIMITS AND CONSTRAINTS

- i. Team size 6(in this case 2 Specialists, 1 Manager, 1 Guru) or 8 or 12 individuals plus 1 optional but strongly desirable Artificial Intelligence assistant.
- ii. 2 Sub-Teams of specialists
- iii. Each Specialist must declare 1 piece of knowledge for which they would like help or a second opinion
- iv. At the beginning of each Short Sprint each Specialist, the younger brother, must declare 1 piece of knowledge for which they would like help or a second opinion (due to lack of recent practice or other) by another Specialist the older brother, from the second day of the Short Sprint for a maximum 1 hour per day at a fixed time and at an open space; the Guru must be able to get an impression of the quality of the session from a distance while for example working on the dashboard
- v. Each Specialist can submit a suggested 2 requests per Short Sprint for *second hand assistance* by the Manager or the Guru
- vi. Each Specialist must declare 1 narrow field special strength
- vii. Subproducts=tasks requiring 7 working days = 1 Short Sprint, max 3 Short Sprints per month
- viii. Groups the tasks in 2 families based on interdependencies
- ix. the dashboard design stays unchanged for 6 days
- x. Project initiation Duration: 240 minutes max.

- xi. *A Daily Standup*: Duration: 20 minutes max
- xii. *Short Sprint preparatory meeting*: Duration: 180 minutes max
- xiii. *Extraordinary session*: Duration: 180 minutes max
- xiv. *Post Short Sprint Team Session*: Duration: 120 minutes max
- xv. *Presentations by the Manager*: Duration: as needed
- xvi. One A.I. assistant for knowledge tasks per project
- xvii. The same Guru can serve many times
- xviii. Multiple A.I. or other IT assistants for no knowledge related tasks for  
example visualization, process, testing, administration

## U. SCENARIOS

### U1. Honey Badger In An Organization With Two Remote Teams

AI Assistant Integration Example: Team Alpha & Beta: Both teams share the same guru and have access to an AI assistant that helps with research, data analysis, and scheduling. Team Alpha uses it to optimize mainly the management of data, while Team Beta leverages it for creative design solutions.

Team Structure Example: Specialists & Sub-teams: Team Alpha is divided into sub-teams focusing on different project aspects, with specialists in coding, design, and testing. Team Beta has a similar structure but specializes in marketing strategies.

Communication Example: Scheduled Check-ins: Teams Alpha and Beta have daily video-conference facilitated stand-ups and all Honey Badger events including the final presentation by the manager take place online. The Dashboard is a digital document.

Framework Compliance Example: Guru's Role: In Team Alpha, the guru ensures that the team adheres to the Honey Badger framework, and provides expert knowledge in maintaining documentation standards. Team Beta is served by the same guru who does the same job with the difference that he/she additionally provides some expert input on matters of compliance.

These examples illustrate how the Honey Badger Guide facilitates structured workflows and effective communication, ensuring that remote teams work cohesively and efficiently.

## U2. Honey Badger In A Trading Firm

Here's briefly how the Honey Badger Guide could be applied in a trading firm:

**AI Integration:** The trading firm can integrate an AI assistant to handle some data analysis and market research, making it accessible to all team members, including those working remotely.

This AI can assist in predicting market trends and providing real-time updates on stock performance.

**Team Structure:** The firm's trading team could include specialists in market analysis and execution, a manager to oversee operations, and a guru who ensures adherence to the Honey Badger framework and has expert knowledge in trading strategies and/or regulations. Sub-teams might focus on different markets or asset classes, facilitating flexible collaboration regardless of location.

**Communication:** Formalized communication events, such as daily briefings and strategy sessions, would ensure that all team members are aligned with the firm's goals. Intra-team knowledge transfer could involve sharing insights on market movements and trading tactics.

**Framework Compliance:** The guru would monitor the team's compliance with Honey Badger and the firm's trading framework, including risk management protocols and regulatory requirements. This role is crucial for maintaining discipline in trading practices, especially for remote team members who may not have direct supervision.

By following these guidelines, a trading firm can maintain clear communication, structured workflows, and effective use of AI tools to enhance decision-making and trading outcomes.

## V. GLOSSARY

**AI Assistant:** An optional but recommended tool integrated into teams for knowledge-related tasks.

**AI Integration:** An AI assistant is integrated into the teams for knowledge-related tasks, and all decision-makers in the organization use it. Other types of AI are welcome.

**Brother System:** Each specialist, the “younger brother,” must declare a knowledge gap and seek help from another specialist, the “older brother,” for a fixed time during sprints and receives assistance.

**Communication Events:** Scheduled meetings designed to facilitate project initiation, sprint planning, and team discussions.

**Dashboard:** A physical or digital board updated by the Guru to reflect project progress and team metrics.

**Daily Standup:** A brief, information-only session where team members share updates on their work and any impediments or successes.

**Director:** As understood in standard business.

**Extraordinary Session:** A meeting called by the Manager to inform the team of significant new developments or to request specific information.

**Guru:** A role responsible for ensuring framework compliance and assisting with knowledge transfer.

**Honey Badger Framework:** An AI-assistants compatible, agile management system that is also ESG compliant and respects the role of leadership.

**Manager:** The authority figure who oversees product requirements, task assignments, and team motivation.

**Manager Presentations:** Occur as needed, often after a sprint cycle, where the Manager presents product features or consulting recommendations to stakeholders.

**Post Short Sprint Team Session:** A review meeting to discuss progress, problems, and ways to improve Honey Badger execution.

**Project Initiation:** A comprehensive session to discuss the business case and value of the product or service requested by stakeholders.

**Requests for Assistance:** Specialists can submit two requests per sprint for second-hand assistance from the manager or the guru, which can be rejected for any reason.

**Short Sprints:** Work cycles designed to fit tasks that can be completed within 7 working days.

**Short Sprint Preparatory Meeting:** A brainstorming session followed by task assignments and sprint initiation.

**Specialists:** Team members with expertise in specific fields who work in competing sub-teams.

**Teams & Sub-Teams:** Teams consist of specialists divided into two competing sub-teams, with a manager overseeing the tasks and motivation.

## W. VERSION NOTES

Version 1.1: Some of the issues of the agile frameworks are now mentioned in the introduction, the numerical constraints of the framework have been underlined, minor wording changes and some additions

Version 1.2: New section at the start: A. HONEY BADGER IN A NUTSHELL. Some of the issues of the agile frameworks are now mentioned in the new MOTIVATION - ISSUES ADDRESSED BY THE FRAMEWORK section replacing the INTRODUCTION section. New section names before the TEAMS section: INTRODUCING THE HONEY BADGER, PHILOSOPHY – PRINCIPLES, new sections towards the end of the guide HONEY BADGER IN ACTION, SUMMARY OF THE HONEY BADGER LIMITS AND CONSTRAINS; one new event: Project Initiation; minor wording changes and some additions

Version 1.3: New section: Impact Investing and ESG compliance, the central role of the Guru, ensuring framework compliance is further emphasized, minor wording changes and some additions

Version 1.4: New sections: O. COMPARISON WITH PMP, PRINCE2, SCRUM, AGILE2, P. LEADERSHIP, Q. REMOTE/HYBRID TEAM MEMBERS OR TEAMS, R. ORGANIZATION-WIDE ACCESS TO ESSENTIAL INFORMATION, S. SCENARIO: HONEY BADGER IN A TRADING FIRM, T. SCENARIO: HONEY BADGER IN AN ORGANIZATION WITH TWO REMOTE TEAMS, U. THE FINANCIAL IMPACT OF THE HONEY BADGER PM FRAMEWORK. Respecting the role of leadership is further emphasized, minor wording changes and some additions

## X. ABOUT THE AUTHOR

Georgios Fradelos, PhD, PRINCE2, PSM, a Cambridge-educated visionary, has made strides in the Fintech sector with his expertise in AI applications in consulting, finance, and management. He led over 40 projects, navigating change and implementing innovative solutions. The creation of the Honey Badger agile management framework, is a testament to his commitment to Environmental, Social, and Governance (ESG) values, safe adoption of AI assistants, impact investing, and the role of leadership.

## Y. DISCLAIMER

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