

# The Emerson Blog, Volume 2

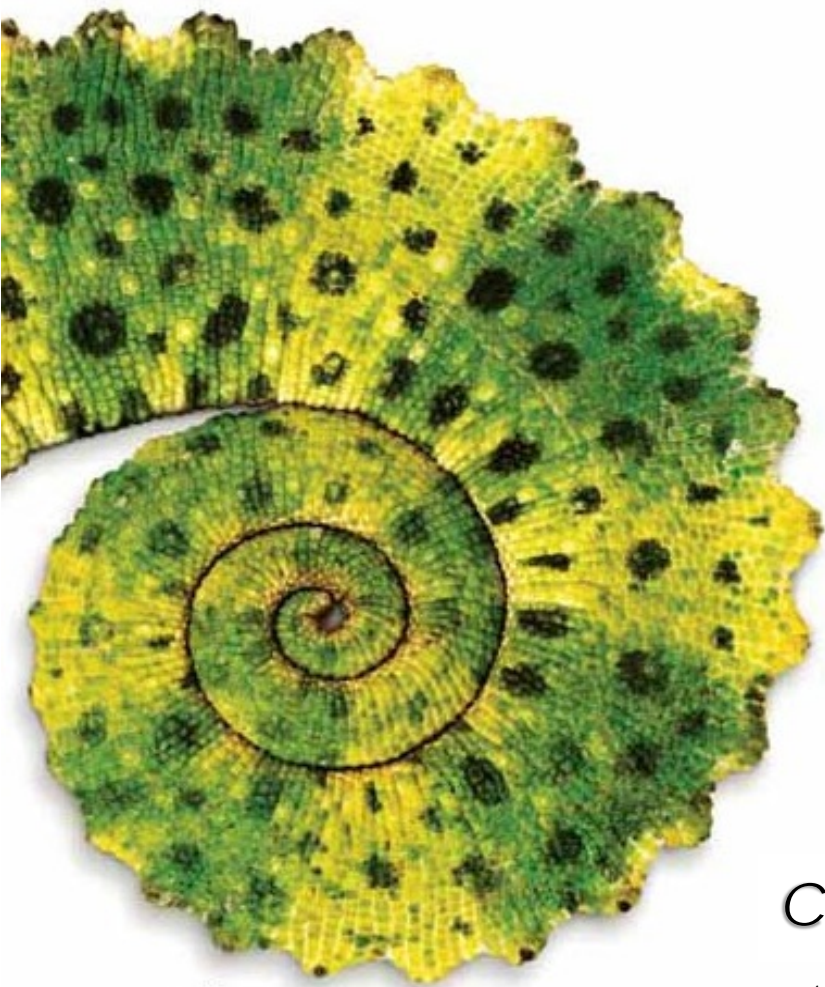
Some of our favorite blog posts on change, learning and technology



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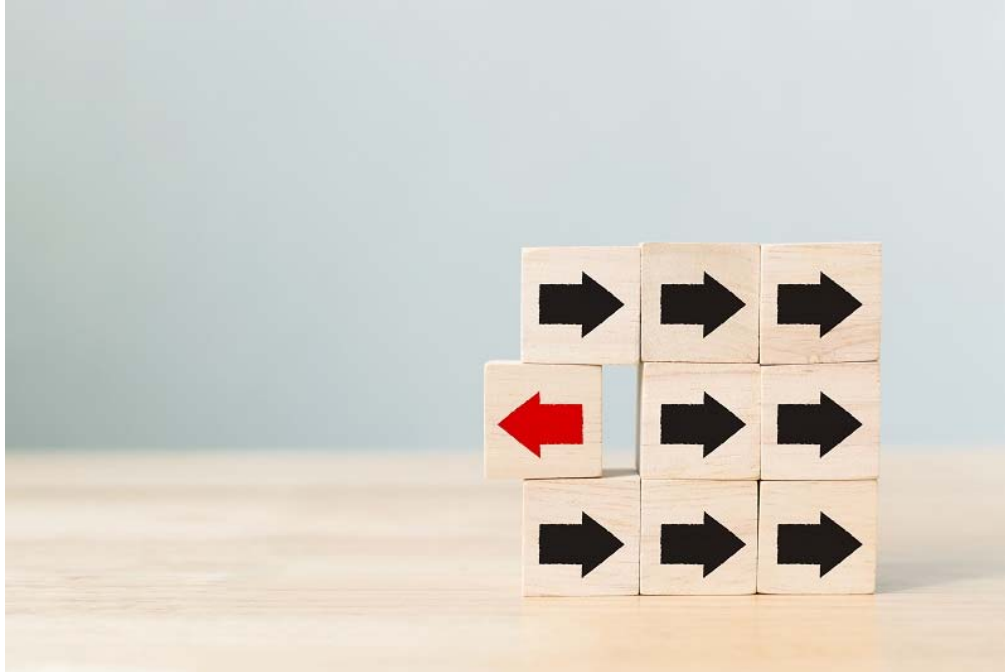
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# Find the Right Leader



*Change Management*

## Find the Right Leader



By Emerson Vice President of Consulting, Christian Hasenoehrl

Did February leave you feeling dizzy? A market correction is defined as a 10% downward movement in stocks from a recent high water-mark. Corrections happen with some regularity but – until last month – there hadn't been a correction in over two years. The recent sell-off delivered a rude wake-up call to complacent investors. Stocks not only declined by more than 10%, they also fluctuated by 4% or more many times over several trading sessions. The movements were magnified by automated trading strategies betting on a long-term bull market with low volatility. If last month reminded you of the beginning stages of the financial crisis, you're not alone. Many of the so-called experts offered comparisons to prior stock market disasters. As Warren Buffett famously pointed out during the last crash, the emperor has no clothes, and you can always tell who's been swimming naked.

So what type of leader would you bet on to lead your company out of a crisis? It depends on the situation and the leader's style. Leaders can be characterized as Futurists, Disruptors, Administrators and Specialists. Each type has its strengths.

**Futurists** like Jeff Bezos will bet everything today on a payoff tomorrow. This means taking huge risks and loading up on leverage to gain market share. Bezos was a first-mover in cloud computing, amassing massive scale by seeing the future of cloud computing before anyone else. IBM has desperately tried to enter the game, but did so late. AWS (Amazon Web Services) is now the most dominant player amongst cloud computing platforms and extremely profitable. When Amazon does report a profit, nearly all of it is from the AWS division, subsidizing the growth of online retail - the idea being that one day in the future they will dominate online retail and categorically start raising pricing.

**Disruptors** like Elon Musk believe that any strategy is great so long as it is not the current one. They have no interest in maintaining the status quo. They create upheaval and uncertainty for businesses. But Disruptors like Musk can create the momentum to change an industry; he transformed the automotive, space exploration and solar power industries, but holds on to management control with mixed success. Jack Welch disrupted his industry to create an industrial giant that was either number one or two in every segment. Businesses that did not succeed were sold off. However, the empire was built with leverage and massive structural risk, leading to a near-collapse during the financial crisis.

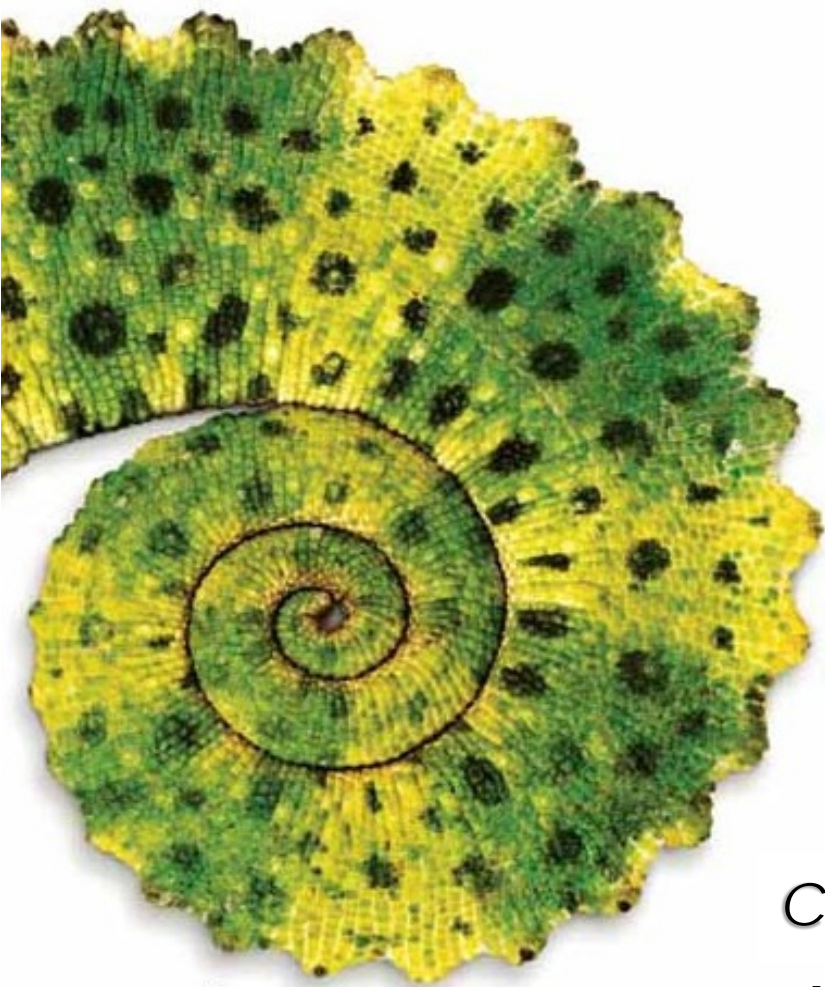
**Administrators** are complacent managers, like every one of the CEOs at Walmart who followed David Glass. Or Jeff Immelt, the Administrator who presided over the dismantling of GE after Jack Welch. Jeff navigated through the financial crisis and secured the survival of the company. Administrators will masterfully preside over a well-oiled cash generating machine. But, like Wells-Fargo's Administrator CEO, they can fail to recognize the severity of a crisis and ignore it or try to sweep it under the rug. Wells classically mishandled their crisis of confidence by ignoring the obvious and keeping the same leadership in place across much of the company, even after the allegations came to light. Hoping a crisis will go away is not good change management.

**Specialists** are not always well-known names. They are brought in to manage a specific set of circumstances. Specialists might focus on conserving cash during a financial crisis or reviving a company fallen on hard times — like John Flannery, the Specialist brought in to save GE by making tough and unpopular but necessary choices. Flannery has a rough road ahead, as he attempts to turn around a historic company, but he might just be the right man for the job. Ian Cheshire of Kingfisher navigated the financial crisis with distinction, focusing the company on conserving cash and investing heavily in people to keep customers engaged and spending. Kingfisher owns the largest home improvement store chains in UK and France, and eight other countries. Mary Barra of GM, managed not only to make GM profitable, but has positioned them to displace Tesla as the leading manufacturer of electric and autonomous vehicles. She made huge investments in alternative fuel technologies, including battery-powered vehicles

and driverless car technology, to position GM as a leader for the future. She also restructured GM to be in a better financial position to invest in the future.

Each of these leadership styles is perfect for a certain situation. So who do you want in a financial markets crisis? You don't need a Futurist – they follow a vision but might not last to see it through. Don't rely on a Disrupter – they focus on change and doing things differently, but are not great managers. You definitely don't want an Administrator — they fail to see disruption and don't adapt well to changing business climates. What you need is a Specialist, focused on a short to medium-term horizon to stabilize the business and position it for survival. The lesson: pick a leader for the task ahead.

# Five Tips for Communicating to the Masses



*Change Management*



## Five Tips for Communicating to the Masses



By Emerson Human Resources Director, Shiva Krishnan

"John Doe resigned for personal reasons. He is no longer with the company. If you have any questions, please reach out to your HR representative."

I remember feeling uncertain and curious after receiving this cryptic email, a few years into my career. One of our cherished senior leaders had left without any warning or good-byes. The rumor mill was working overtime. All of us were filling the information void with speculation, including the possibility that he was fired.

At that time, I couldn't fathom the overwhelming and negative response to an almost endemic workplace event. But now I know that the problem was not this change, but the way the change was communicated.

The problem is that the human brain sees unfamiliarity and uncertainty as a threat. Having experienced many workplace changes over the years, I've seen how potent good communication is in preventing that negative reaction.



Here's how to elevate your communications during a change:

Provide **Specifics**: the reasons and outcomes.

X This is the new structure. We will need to downsize, but this will help us deliver fantastic results.

✓ We need to strengthen our core business to survive. The new company structure will make us more agile so we can serve customers better and thrive in this competitive market. We're currently the third strongest company in our sector but we believe that, together, we can be number one.

Define **Shared Success**: the measurements and outcomes from the employee's point of view.

X It will improve our core business which will result in higher profitability.

✓ It will improve our core business pipeline. We plan to achieve two-digit growth in three years, resulting in more opportunities and higher wages for our employees.

Keep it **Simple**: short, succinct and in simple words.

X We need to leverage each other's strengths to make this organization a better place — not only for us, but for employees of the future.

✓ We need your support to rebuild our company.

Talk about the **Support**: tools, aids, two-way communication and training.

X I hope we answered all your questions and look forward to your support.

✓ We encourage you to send questions to the helpline. Your local leaders will be conducting town-halls and one-on-one meetings, starting next month, to keep you updated and hear your reactions and ideas.

*(This one's my favorite.)*

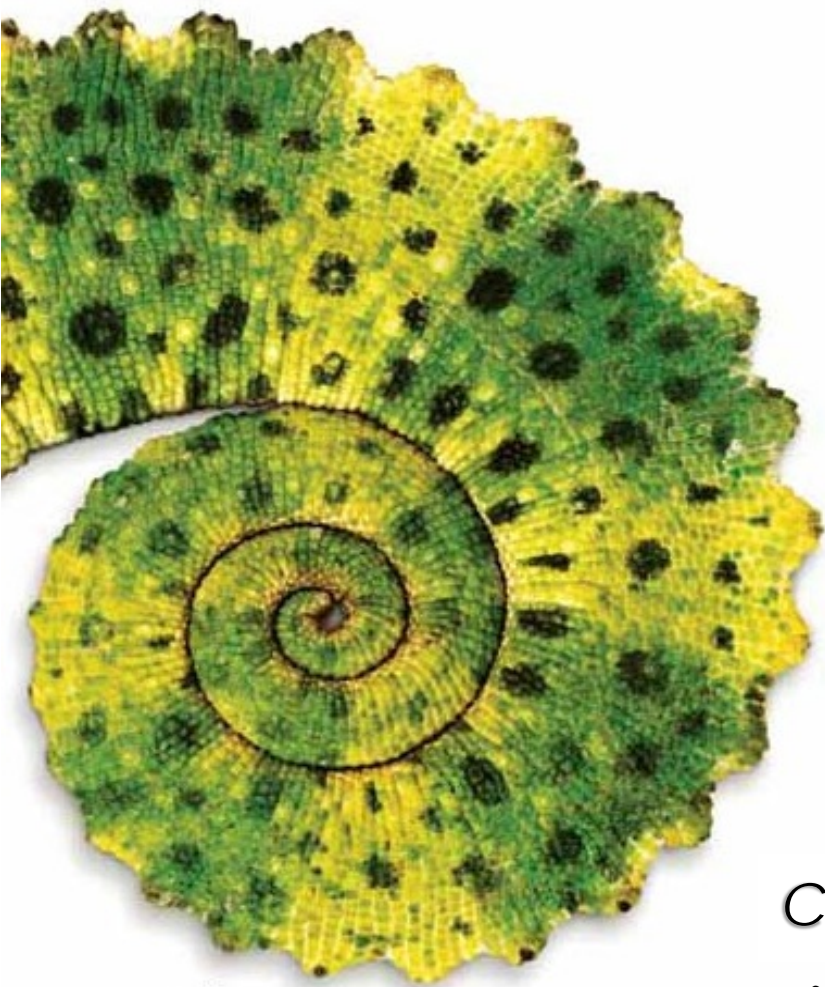
Be **Soulful**: passion, empathy, respect for the individual, and aligned values.

X \*Crickets\*

✓ It's a difficult day for our organization. For those who are included in the layoffs, you will receive severance and support as you move on to another job. For those who remain part of the company, you are our future and crucial to rebuilding the company.

As Rasheed Ogunlaru, a leading business coach, once said, "The only way to change someone's mind is to connect with them from the heart." Don't be afraid to engage your employees. Transparency builds trust, and trust is key to the success of any change.

# How to Be an Effective Project Sponsor



*Change Management*

# How To Be an Effective Project Sponsor



By Emerson Director of Change Management, Kim Lewis

A project sponsor is the heart of any organizational change. Sponsors are critical – they clear the way and provide the fuel to keep everyone on course.

Sponsors are well-respected, credible senior leaders (executive or management team) who have overall accountability for the project. They ensure the project is aligned to the company's strategy and goals. A project sponsor is personally vested in the success of the project and is active and visible throughout the life of the project

Here are a few tips for Effective Sponsorship on any project:

**Own the Mission.** Inspire the team toward a compelling vision. Make the project personal to focus the team's attention on project goals.

**Set the Direction and Course.** Establish clear roles and responsibilities, expectations and timelines for your team. Make yourself available and be actively involved in key decisions.

**Clear Obstacles.** Make the project a priority. Eliminate other activities that might distract team members or divert energy and attention from the project. Have clear escalation paths for issue resolution and to manage risks impacting the project success.

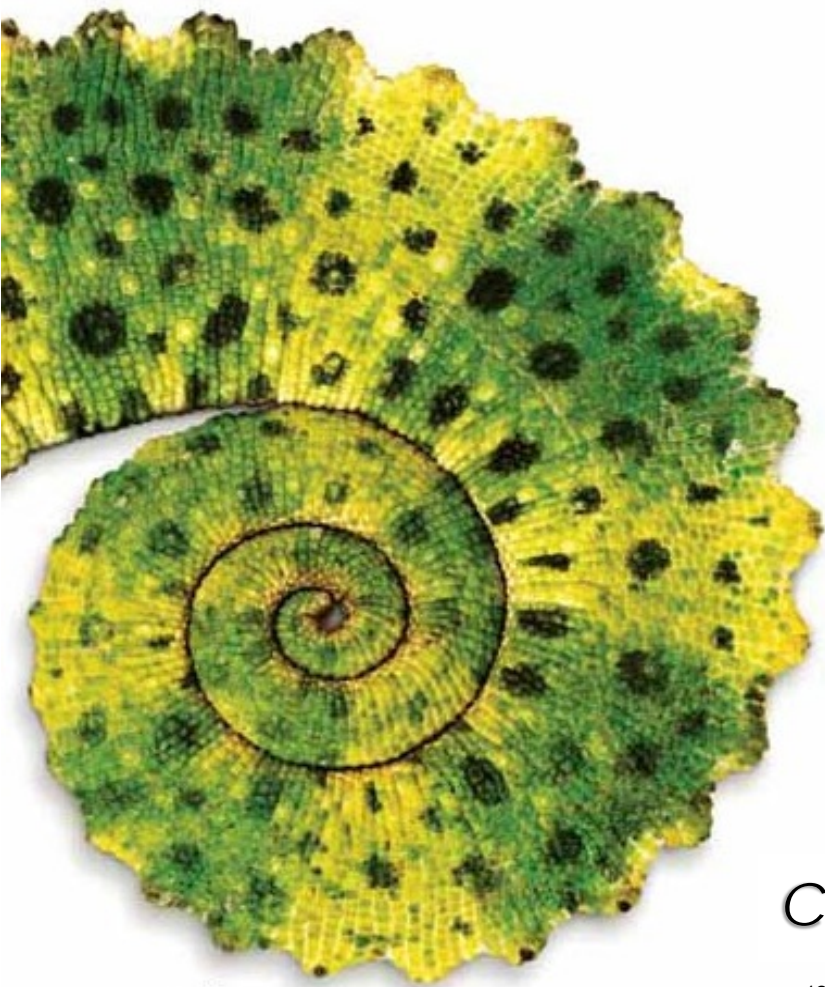
**Secure Resources.** Commit the resources with the right skills and ensure funding is in place to support the project.

**Lead the Team Toward its Highest Objective.** Model the new desired behaviors. Respect and trust in the expertise of your team.

We have all been a part of projects that feel the lack of sponsorship. Being a project sponsor is not a one-time event. It requires sustained involvement throughout the project's lifecycle.

Keep these simple actions in place and become the example for your company and team! It's critically important to your organization's success.

# How to Brand Your Project



*Change Management*



# How To Brand Your Project



By Emerson Client Director, Lisa Westerfield

What are the best brand images you can think of? Maybe it's Nike's iconic swoosh, the golden arches of McDonald's or Apple (minus a bite), or. Nike's logo says "speed." McDonald's huge glowing initial, flung high into the sky, beckons people from miles around to a guaranteed, hot, fast delicious meal. Apple's logo represents the original taste of knowledge. Successful companies use these symbols to connect consumers to their brands. Of course, we brand our change projects too, for the same reasons. We want people to connect to the initiative, understand its essence, and buy in.

To develop a strong brand for your change project, answer these questions:

**What is it?** If you haven't already, define that vision and get leaders aligned.

**Who are we trying to reach?** Identify the target audience for your brand. Who do you need to motivate? Define them. Are they end users of a system? Customers? Virtual global teams? How many? Where are they?

**What will make it stick?** This is about audience and culture. What do they value? How do they see themselves? What was their reaction to previous initiatives?



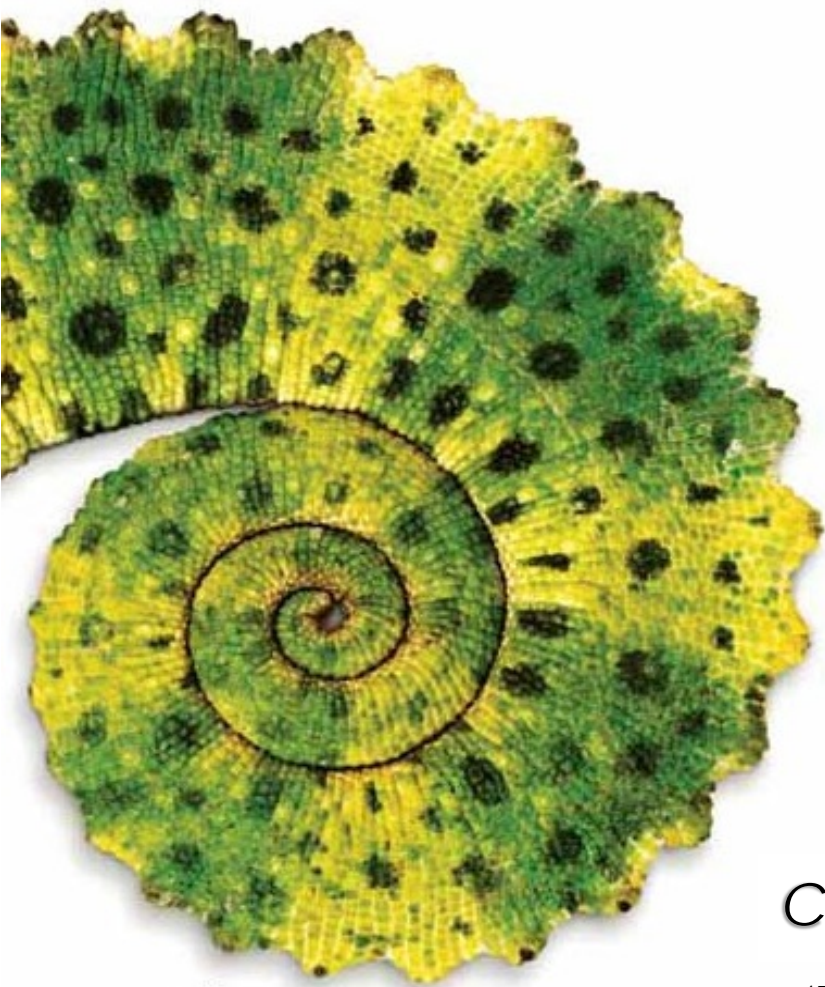
**What are you trying to say?** You need a core message. Is it speed? Excellence? Innovation? Making people's lives better? Make sure your brand says that.

**What does it look like?** The visual – logo, colors, mascot, tagline – comes last.

**Where does it go?** Think about where your audience is, both physically and virtually. Break rooms? Employee website? Meetings? Project communications? Layer your brand message so it's inseparable from the change.

My last tip: when in doubt, keep it simple. A good brand doesn't make people think too hard; they just get it. A simple, strong, memorable brand will give your project the boost it needs.

# How to Change a Toxic Culture



*Change Management*

# How to Change a Toxic Culture



By Emerson CEO, Trish Emerson

Culture is composed of the unspoken rules that drive employee decisions. MIT Professor Edgar Schein defines it as repeated behavior. Lately, we're seeing an increased number of companies whose unspoken rules and repeated behaviors create toxic work environments.

But how do you change a toxic company culture? Culture is deeply entrenched, and changing it is like shifting the course of a river. If we want to truly change the river of culture, we need dynamite and dams – drastic measures reserved for an organization in existential crisis.

## **Dynamite**

These are strategies intended to disrupt – to so dramatically change the geography that the previous terrain is obliterated and unrecognizable.

**Focus attention.** Humans change only when the current system no longer works for us. We must convey that the current system is unacceptable and over, then keep this message in the spotlight. For example:

- ◆ Terminate people who embody the toxic behavior — no excuses. Even if they are top performers.
- ◆ Change symbols that represent the old culture. Examine work spaces, pay scales, meeting structures, social rituals, and brand names. Such artifacts can trigger old habits. Rid the organization of them and replace them with fresh symbols that signal a new day.

**Invoice a critical mass of the organization.** You need enough people to create momentum. Put them in a room at the same time. You want them to hear the same message and, ideally, work together to design new ways of working. You can even do this with hundreds of people at once – it's incredibly powerful. When they leave, they will have a shared vision of what has to happen.

**Move swiftly.** Research shows that you must show progress within 90 days. Otherwise, people revert to their old habits. We encourage our clients to post their 90-day plan on their walls, and to update it with new information – successes and setbacks. This creates a sense of progress and unifies the organization around a shared experience.

## Dams

These strategies ensure that the river moves exactly as intended. This is the infrastructure that embeds behavior into the normal flow of day-to-day operations.

**Clearly define which behaviors must change and what is expected.** Glittering generalities won't cut it. For example, healthy people usually agree that we need to "be inclusive" and "operate with integrity." The question is, what does that look like? What, specifically, do I need to do differently on Monday than I did on Friday? Simple, tactical behaviors, defined in small steps, move an organization forward.

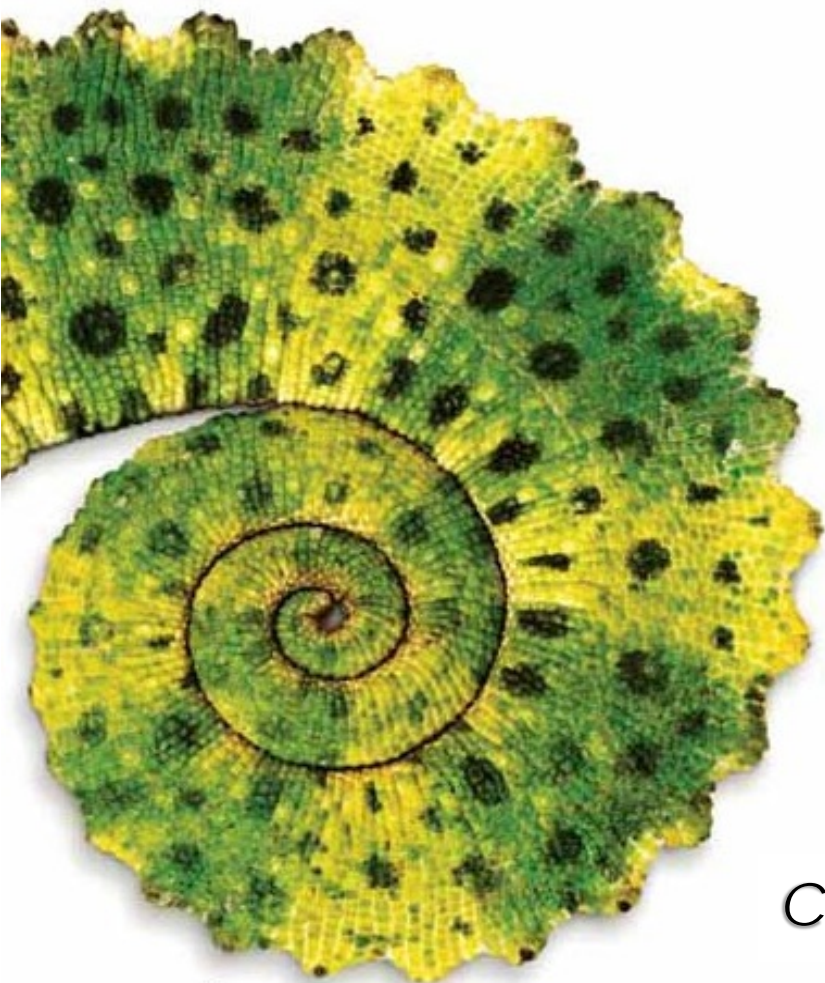
**Get your execs on message.** Leaders must be able to describe what you are doing consistently and passionately, using their own stories, without relying on PowerPoint or email. When all of your execs are aligned and consistent, your employees know unequivocally that the direction is true. The easiest way to do this is to work with your executives to develop a message frame.

The message should answer four questions: What problem are you trying to solve? What is the solution to it? What approach are you using to implement that solution? And finally, what do you expect the result to be? Choose one word that represents the answer to each of the four questions. Why? Because it's easy to remember four words.

**Create the infrastructure to sustain the new behavior.** You need people to monitor your progress and follow up when things go off course. Build training on new behaviors for new employees. Align performance management with your new values. Infrastructure is usually the easiest part of the change; the key is to establish owners and deadlines.

It takes courage and commitment to disrupt a toxic culture. It's best done by moving swiftly with a clearly defined course and employee involvement. As employees succeed in practicing these new rules and behaviors, your culture will become a self-reinforcing system.

# Four Ways to Communicate Effectively



*Change Management*



## 4 Ways to Communicate Effectively



By Emerson CEO, Trish Emerson

You've done the work. The consultant you hired has given you a dense excel spreadsheet detailing audience, message, vehicle and timing. You're executing against it. Your senior execs have delivered PowerPoint presentations, participated in talking head videos, and sent "sponsorship" emails. You have created a network of people to answer questions and send you feedback. You've distributed posters, tchotchkes, apps, and given your project a catchy name. But you're not getting the traction you hoped for. Did you communicate effectively?

People seem unclear on what you're trying to do, and unaware of the key points. Executives are frustrated because they feel like they've relayed the information, but no one understands it. And employees won't use the new process, system, method, tools, service model you are trying to deploy. So, what's going on?

The answer: It's just too much. Your employees are being assaulted by information and demands on their time. They simply can't keep up.

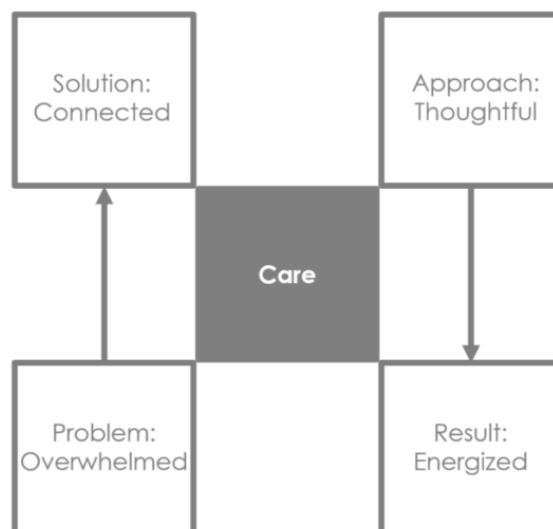


According to the [Radicati Group](#), 281 billion emails are sent worldwide daily. With 3.8 billion users, that's 74 emails per person. Every day. Bain Consultants estimated in a [2014 Harvard Business Review article](#) that 15% of company time is spent in meetings. Verizon commissioned a [study](#) that found people attend over 60 meetings per month, accounting for 37% of their time. And the [Wall Street Journal](#) reported that we are distracted every three minutes.

You are not in the communication business; you are in the attention business. If you want to be heard, you have to help people cut through the noise and focus on what's important. That requires additional signals that indicate that your message is relevant, worthy of people's limited time, and cause them to take notice.

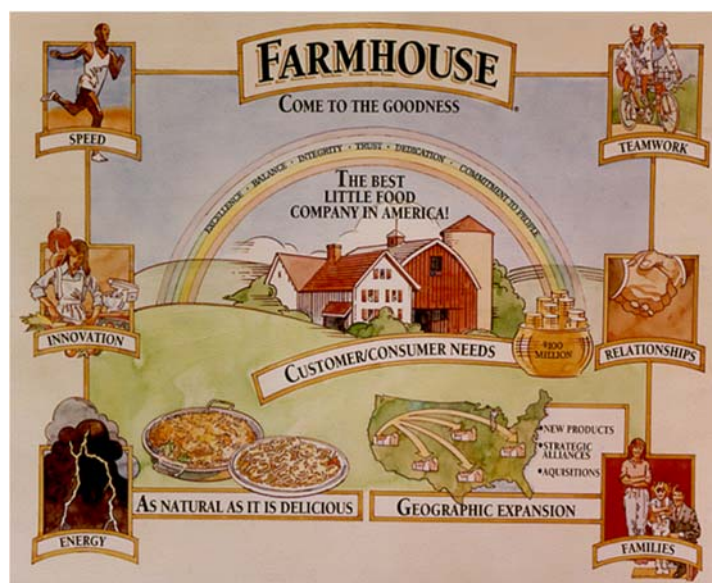
**Keep it simple.** Distill your point to its essence. Once you do that, choose four words to capture your story. Four words are easier to remember than an elevator speech.

A childcare company was implementing new technology. They did it because their caregivers were overwhelmed. The solution? Make sure those people were connected to the right people and information. They employed a thoughtful approach to the implementation. Their intended result? Energized people. These words were easy to remember without relying on PowerPoint. Anyone from any department could provide examples for those words, and they did. Simplicity creates clarity.



**Use visuals.** [Research](#) shows that people can remember 2,000 pictures with 90% accuracy, likely because visuals engage more of the brain. It doesn't matter whether the person is focused on memorizing the images or casually exposed to them. There's an extra, unconscious leap for translating an image to a word, which is why words are harder to remember. Line drawings are particularly easy to recall, perhaps because they are visually more complex. Crude hand drawings are superior to stock images any day. [Dan Roam](#) has a great book, *Draw to Win*, that can help you overcome your self-consciousness and create your own powerful visuals.

Peter Molloy created a "visual vision" to convey company direction when he ran Farmhouse rice company. It was so effective, he used the same technique again when he ran La Terra Fina dips and quiches. Why? According to Peter, "There's something about a picture that makes a concept real. Illustrating our vision made it come alive."



**Employ novelty or contrast.** Subconsciously, we are constantly looking for a threat. That's why anything unusual piques our interest. Anything you do to create disruption — whether it's in stories, process, color, structure, or volume — causes people to notice. Use variety and look for surprising ways to present your point.

Years ago, an IT department in a Chicago hospital implemented a standard approach to requesting support and custom reports. Historically, people paged their favorite IT person to fulfill the request. (Yes, it was that long ago.) When the department went to the new process, they changed the staff's pager numbers. This small disruption signaled that employees needed to use a formal request process for custom reports.

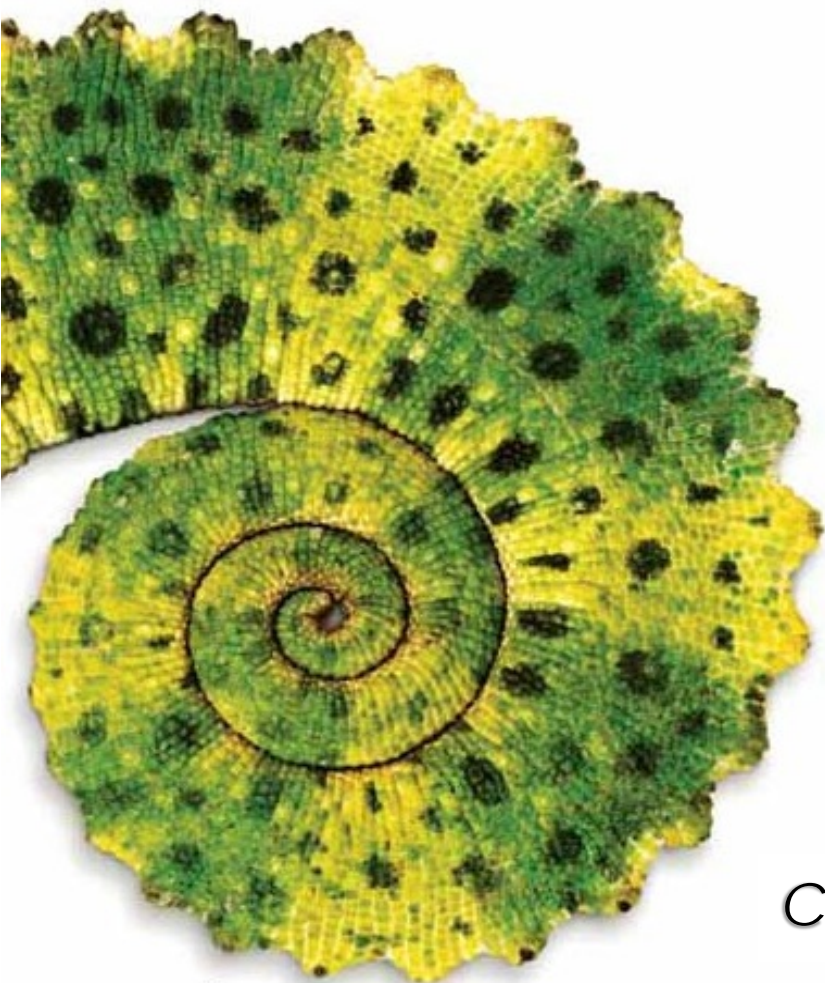
**Use environmental cues.** Look at the workplace itself, like the office layout, what people are doing every day, and what they see and hear. Then make sure that what a person encounters every day reinforces that message and doesn't contradict what you are saying

My first professional job was as a customer service rep. The company told my new-hire group that we represented a new era – they purposely hired fresh college graduates to serve customers by solving claims problems. However, we were measured based on the number of calls we took, not on the number of issues resolved. It didn't take long for these college grads to reprioritize. We learned to process as many calls as possible, with mixed results for the customer. Our environment told us volume was more important than service.

By contrast, Chevron decided years ago to create a safety culture. That meant asking introverted engineers to be a little confrontational if they saw something unsafe. Uncomfortable. All the communication in the world wouldn't address that behavior. So, they made a point of starting every meeting with a "Safety Moment" where each person had to identify one unsafe thing they saw that day. Over time, they layered that with other activities, such as assessing each person's workstation to ensure it was ergonomic or confronting one another for driving while talking on the cell phone. These environmental cues reinforced behavior in ways no email campaign could.

The best communication plans fail because they don't apply the best thinking on human behavior. Don't churn out information and hope it sticks. Pay attention to your people and how this affects them. Focus your attention on the behavior you want and your people will keep your outcomes prioritized and top of mind.

# Five Insights From a Rockin' CLO



*Change Management*

## 5 Insights from a Rockin' CLO



By Emerson CEO, Trish Emerson

A dear friend of mine is Chief Learning Officer of a prominent, widely admired company whose lawyers asked us to mask his identity. We've worked together since 2003, so he was naturally one of the first people I interviewed when I decided to write a leadership book. In fact, as a direct result of his interview, I hired an EA (yay, Michele!), applied his system for reducing my email inbox to zero (here's to you Sally McGhee!) and prioritized ways to create the life I want.

One of the questions I asked him was, "What advice would have prepped you better had you received it early in your career?" Here are five insights he shared with me.

**1. Be clear about your strengths.** As an INTJ on the Myers-Briggs, I'm naturally reflective rather than reactive. I need to process and come back. I learned to create a window of opportunity to do that, to be aware in the moment and say, "I'll get back to you." If I had learned that as a younger person, I would have made better decisions.

**2. Face the thing you don't want to do.** If you don't, it will only harm you. There was a colleague I worked with years ago who was smart, extroverted and, frankly, we didn't get along. I began to avoid that person. Our lack of communication escalated to the point that it actually contributed to a job change. Recently, I had a similar situation, but by then I had learned to face the hard work. My reaction? I scheduled regular meetings with my coworker. Getting to know each other has made things easier. We might not be best friends, but I have learned to focus on this person's strengths and use our complementary styles to create good work together.

**3. Don't overschedule.** So many people allow the day to control them. If you start the day fully booked, you are in trouble. You have no bandwidth to assess, respond, and shift priorities. Twenty-five percent of the day should be unplanned. The more senior you are, the more unplanned your day should be.

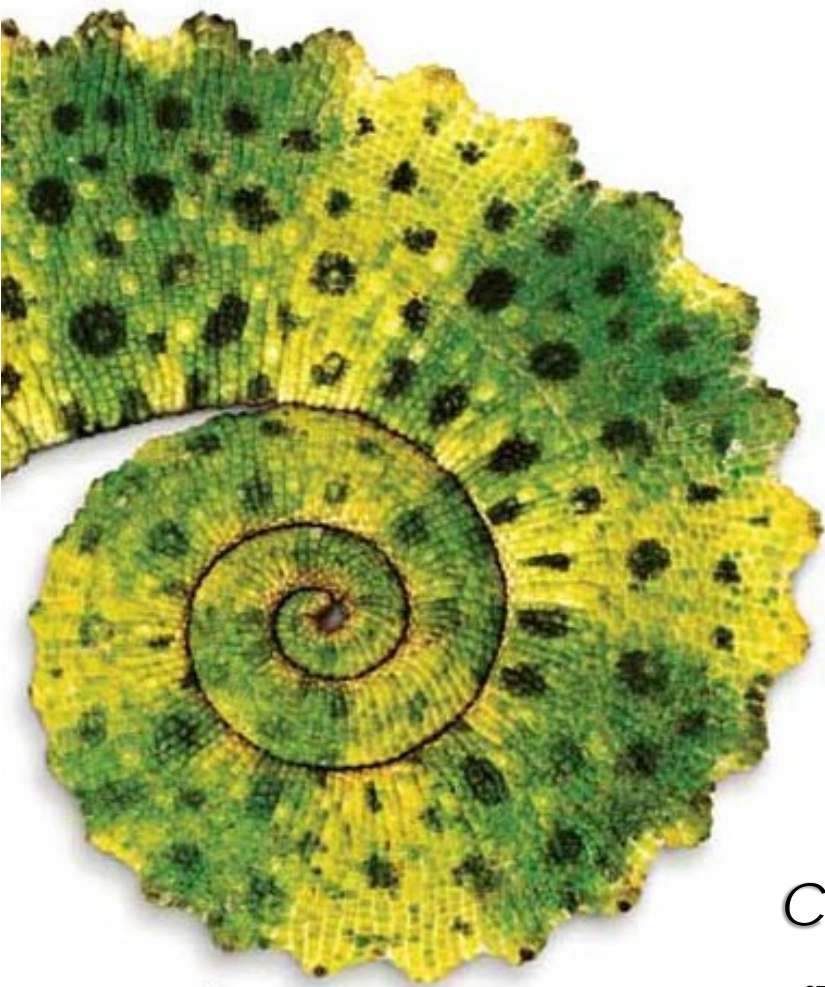
**4. Understand the power of a great admin.** The right assistant is someone you can trust and someone who knows you well enough to help focus you on your goals. My admin helps me be successful, with ease. She reminds, reschedules, and facilitates. She puts both contracts and birthday cards on my desk to be signed. She helps bring my intent to reality.

**5. Over time, increase bandwidth or capacity.** How are you aligning others around you to magnify your impact? As the years go by, it's less about what I do and more about how much I accomplish through others. If I can get more done while maintaining expectations and standards of excellence, I feel I'm growing my company and myself.

There's a thread through my friend's observations that we can learn from. For me, it means challenging myself before taking on a task and asking, "Will this investment of time result in something that expands or does its effect end when I stop doing it?" It's a true-north question that helps prioritize. As leaders, our common limitation is time. Our effectiveness is directly related to how we shape our time to create the ripple we want.



# Make Your Change Feel Predictable



*Change Management*



## Make Your Change Feel Predictable



By Emerson Consultant, Kelley Egge

Weathering change is easier when leaders make it predictable.

I am so relieved when my local forecaster accurately predicts bad weather. I follow their advice every day and I'd like to think they save me from many icy accidents and horrible hair days. But recently, the weather has been a source of real anxiety.

Multiple deadly storms ravaged our country this year. Just a couple of weeks ago, mudslides killed more than 15 people in Southern California. Without warning from local forecasters, the death toll could have been much worse. But 15 is still too many! These deaths may have been prevented with more time and/or information to better prepare. I find my thoughts often consumed by "What if?" and "What could happen in my own backyard?"

According to a study from the University of Illinois at Chicago, having an increased sensitivity to ambiguous, uncertain threats—or a heightened fear of the unknown—is at the root of a wide range of serious anxiety disorders. And change is high on the list of perceived workplace threats.

In today's high-paced business environment, change is constant. Unless we are lucky enough to live with a psychologist, fears of failure or job loss can fester into visceral and unhealthy responses. In the workplace, that may translate into lack of focus and motivation. At home, it may lead to substance abuse, depression or anger.

To avoid a potential downturn in productivity at work, it is important for leaders to give their teams a predictable environment in which change is valued and expected. Though often wrong, predictions can give us a sense of control and a clear set of expectations. This helps us conserve our energy and more effectively prepare for the changes ahead.

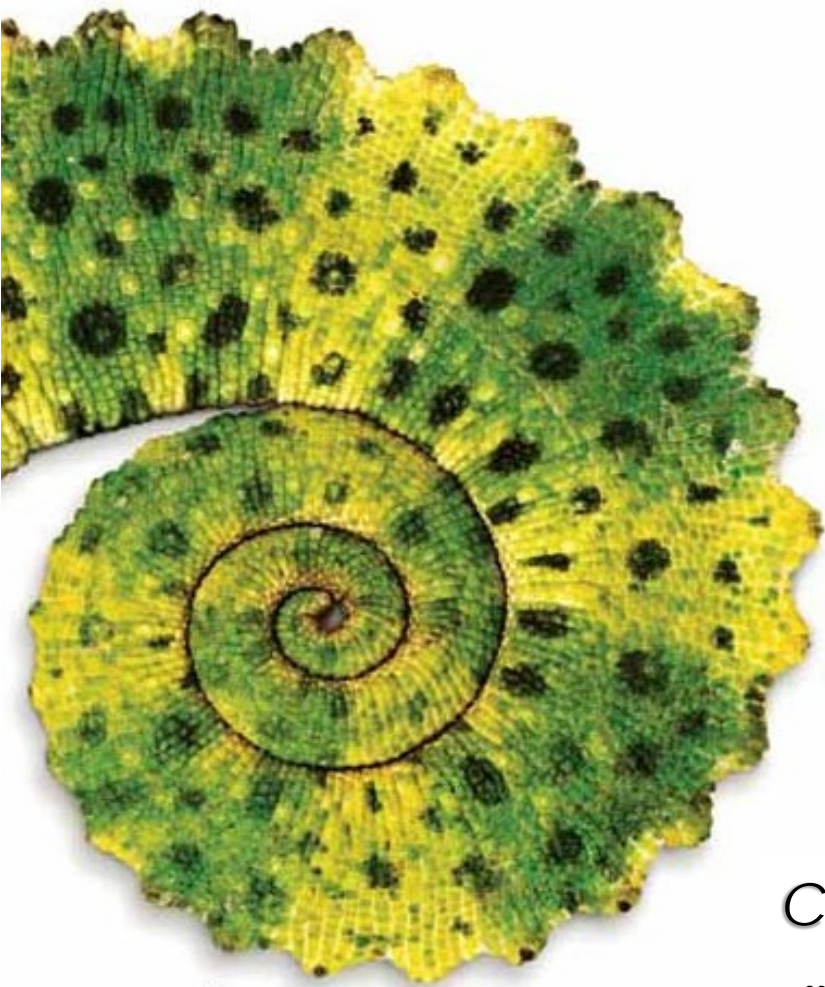
Here are a few tips for making change predictable for employees:

**Don't surprise them.** Be sure to give plenty of advance notice and involve them as often as you can with regular updates. This will give your team a sense of control, helping them plan for the change in their own way.

**Be specific.** If people understand exactly what is changing, with details about how the change will impact them, they will feel more comfortable moving forward. Generally, people tend to go straight to the worst case scenario.

**Link it to what they know.** Show them how it is similar to a previous and successful change. Be sure to use positive metaphors and examples.

# The Four Elements of a Powerful Message



*Change Management*

## The Four Elements of a Powerful Message



By Emerson COO, Cathy Quon

You're proud of the project you're working on. You've invested late nights and a couple weekends. You missed your son's semi-final soccer game and your friend's birthday dinner because of it — it's that important.

But imagine this: a colleague stops you in the cafeteria and asks you about the project.

**Them:** Hey, what's this Project Axis about?

**You:** Well, it's a systems implementation to replace Iroquois.

**Them:** There sure are a lot of people working on it.

**You:** Yeah, it's important. It'll solve a lot of things. But it's pretty complex; I don't want to bore you with all the details.

Is that really the best you can do?

No, you don't want to bore anyone. But there's an easy way to get everyone on the project — especially the leaders – telling a short, clear and powerful story.

Distill your project strategy into four main points that are easy to remember.

Select a group of leaders and ask them four questions.

1. What's the challenge we're faced with?
2. What's the solution to the challenge?
3. What's the approach we'll take to execute the solution?
4. What's the result we want?

For each question, brainstorm a one-word answer. Hint: start broad, then narrow down to the top two to three words, and then down to the final one.

Once the four words are selected, string them together in a 30-second elevator speech, buttressed by facts or examples. You'll have a robust answer to the question, "What's that project about?" When you deliver it, customize it for whomever you're addressing. That is, use different examples for a Marketing employee vs. an IT employee. Note that each project member's elevator speech will be slightly different, based on their communication style, area of expertise, and position.

Practice your 30-second elevator speech. Then, practice it again. (Even fluid presenters aren't smooth the first time around.)

Let's try our scenario again. A colleague approaches you and asks you about your project.

**Them:** Hey, what's this Project Axis about?

**You:** Our procurement system, Iroquois is totally outdated (challenge). It doesn't support mobile and has some system "holes" in it. A few of our biggest vendors tell us that doing business with us is getting harder. So we really need a more flexible (solution) system that closes our risk gaps and brings us into the 21st century. To develop the best system, we're asking for the participation (approach) of all our stakeholders, including three of our top vendors. That's a first for us. We think that the new system will increase our efficiency (result) by two-fold. Did you know that, today, it takes us three weeks to get a simple one-month contract set up?

**Them:** Now I see why there are so many people working on the project.

This four-word "message frame" is the foundation of all project communication — road shows, newsletters, emails, intranet pages, posters, etc. Each time it's used, it's made more real with examples, quotes, and facts customized for the audience.

A consistent, well-crafted message helps the organization understand, embrace and support the change.

# Architect the Learning Experience



*Learning & Development*



# Architect the Learning Experience



By Emerson Consulting Manager, Julie Rodgers

How many times have you heard something like this before: “Why are people still following the old process? Didn’t they attend training?”

Training is not an event. Learning a new behavior happens over time. It’s a process. Instructional designers help architect the learning process using a collection of tools to create a structure to support the desired behavior.

The best way to architect the learning process is to put yourself in your learner’s shoes. Understand their daily routine and know where the desired behavior intersects. The “intersection” is the moment when the learner must choose a direction. Will they choose to go back in the direction of their familiar, comfortable behavior? Or will they choose the new and uncomfortable direction and use the new behavior?

That intersection is exactly where you need to put a buttress. If you identify that intersection moment, and design a support mechanism to encourage the new behavior, learners will be more likely to exhibit that behavior at each intersection. Soon it will become a familiar and comfortable behavior for them.

Choosing the best support depends on the situation. Here are a few ideas:

**New system training?** Where do users tend to get stuck? Consider providing job aids or online contextual guidance for just-in-time help. Make sure Super Users are easy to reach for more complex questions.

**New process?** Where does it differ from the old one? Add visual cues at intersections to guide the way. You can also create a community of practice where learners support and learn from each other. This improves performance and helps them understand that they belong to something important to the organization.

**New leadership behavior?** A mentor or coach can provide real-time feedback and reinforce the application of the learning. Include the desired behavior on performance appraisals and consider incorporating a reward system.

Behavior change requires many interventions, used over time. As an instructional designer, you are the architect. Know your learners. Understand how the change will impact their world. And use the tools available to build a learning experience that guides them through the learning to performance. Soon the new behavior will feel like a natural part of their day.

# Blend a Learning Program Like a Top Chef



*Learning & Development*

## Blend a Learning Program Like a Top Chef



By Emerson Associate Director, Kristin Sleeper

I'm not a great cook, but I enjoy watching competitive cooking shows like Master Chef and Top Chef where amazing dishes are created. The TV chefs create an experience using the right combination of flavors, textures, and presentation. There's no cookie-cutter approach; each dish is unique and carefully planned to achieve the optimal eating experience. Likewise, when I want to create a great learning program, I try to use the right combination of learning techniques, blended together, to maximize the transfer of knowledge.

There's nothing cookie-cutter about my learning creations either. People learn in different ways, so putting together the best experience takes an understanding of audience, content, skills and behaviors they need to learn, and any delivery considerations. There are, however, some staples – elements I think about when designing any blended solution.

**Set up.** “Mise en place” is a French term for having all your ingredients measured, cut, peeled, sliced, grated, etc. before cooking starts. Pans are prepared. Mixing bowls, tools, and equipment are set out. It is a technique chefs use to assemble meals efficiently. For blended learning courses, the setup is also important. Provide an overview of the course, including how the course will be organized and delivered. Set expectations with learners about how they will interact with media, measure success, and find support after training ends.

**Present.** Chefs use a variety of ways to share their recipes and cooking methods: books, videos, TV cooking shows, and live classes. For blended learning, we use classroom instruction, group activities, independent learning, eLearning, coaching, etc. Build a blended solutions solution that gives the individual more ways to learn, improving their chance of success. And allow learners flexibility across a blended program; they learn better when they can control their own experiences.

**Demonstrate.** Learning a new recipe for the first time is easier if someone shows you how to do it. Include live demonstrations, video demonstrations, and other ways to observe someone performing well.

**Practice.** The best way to hone your cooking skills is to experience first-hand a dish that turns out great and a dish that flops. Allow learners to practice using the content in a realistic, but controlled environment. Simulations and other realistic trials help learners test their learning and get real-time feedback on their performance in a low-risk setting. And, for tasks requiring human interaction, there’s no substitute for face-to-face interaction and practice in a real or realistic setting.

**Assess.** Good chefs taste their food as they cook to make sure it meets their standards and expectations. For blended solutions, verify the learner has mastered the skills through performance assessment, certification, or informal learning checks. Just as chefs make sure each part of a dish is right, consider having your learners demonstrate mastery of each skill or behavior before they move on to the next.

**Coach.** Every great chef once worked under the wing of an established, reputable chef who taught them the nuances of cooking that can’t be learned from a book. Make managers and peers part of blended learning programs. They should provide structured, ongoing coaching and feedback. This is a key piece of any blended solution; it helps ensure the skills learned through formal training are applied on the job.

**Collaborate.** Social media has become a great platform for chefs and casual cooks alike to share recipes, cooking techniques, and lessons learned. Enhance your blended learning program through communities of practice. These communities enable collaboration during the course; for example, participants might use online chat to ask questions, share information, and solve problems. They are also a great way to deepen skills and reinforce critical behaviors over time.

Successful learning takes many forms because learners and situations are different. It's all about thinking like a Top Chef and finding that optimal mix of techniques. As great chef Emeril Lagasse would say, blended programs give your learning some "BAM!"

# Don't Train on Everything



*Learning & Development*



## Don't Train On Everything



By Emerson Associate Director, Chris Harper

A couple of years ago, I worked on a Learning and Development effort for a major retailer's new financial system. It was the largest ERP implementation in their history. I'd be a very wealthy man if I had a nickel for every time I heard my client say things like:

- ◆ "We have to train them on that."
- ◆ "That's a training issue."
- ◆ "We have to include that in training."

While I appreciated the client's zeal and passion for developing employees, they didn't realize what they were asking for. If they trained their users on every aspect of a new system before go-live, employees would be over-worked and – worse – unfocused. They would spend way too much time in training, away from their work. And they wouldn't be able to apply what they had learned in the context of their jobs. In other words, they wouldn't know how to deliver the behaviors on which the ERP business case depended.

Instead of training the employees on EVERYTHING, we helped the client see that they needed to look at three factors to decide what to train. We call them the three C's.

**Critical:** These are the most important behaviors employees need to perform - typically their core job responsibilities. Ask your stakeholders to answer questions like: What are the most important things for employees in this role to do? What are the essentials? What drives the performance of their team or business unit?

**Common:** These are the most frequent behaviors employees display - the things they must do routinely to successfully complete their work. Ask your stakeholders to answer questions like: What will the employee need to do most often? What are the everyday tasks?

**Catastrophic:** These are the behaviors that, if done incorrectly, would have a significant negative effect on the business. If the employee got these tasks wrong, the department or function would suffer. Ask your stakeholders questions like: What will shut down the business? What would open you up to lawsuits or employee injury?

If you can get your stakeholders to agree on these elements, you will focus your training development efforts in the right places. You will help the organization deliver on the project's business case and get the greatest bang for their training buck!

# How to Build a Good Story



*Learning & Development*

## How to Build a Good Story



By Emerson Consultant, Randi Boswell

Stories have a long history as the teaching tool of choice, but not all are created equal – and not all are good for learners. At 16, I loved reading, yet I did not love “The Scarlet Letter.” Reading it was a slog. The odd language and old-timey morality left me cold. But Ms. Wester’s version? It went something like, “This particular adulteress didn’t feel so bad about her ‘sexy time with preacher.’ After years of everyone’s efforts to bring her low, when she and her secret, tortured guy met up alone in the woods, she was ready to go again.” What a difference two sentences can make.

Like any great teacher, Ms. Wester knew a lengthy lecture wasn’t the way to hook us. Instead, all it took was some relatable phrasing and a fresh spin. Learners crave these kinds of stories – the ones that draw us in, fire our imaginations, and, if we’re lucky, surprise us.

Knowing the potential of stories, why isn't there better storytelling in training? Maybe time constraints are to blame. (We already have miles of ground to cover, and you want me to add more content?!) Or maybe a controlled, play-it-safe approach limits stories to flat, two-dimensional characters. (Employee A always gets it done right, and Employee B never does.) Unfortunately, this disconnect with real-world experiences prompts learners to give us the dreaded snarky-eye-roll-tired-sigh combo. Nobody wants that.

### **How to Build a Story**

**Take a minute.** Stories can pack a powerful punch in a lot less time than you might expect. Remember, jokes are just short stories with a fun finish. Tweets can be 280-character personal stories shared on a vast scale. In short (pun intended), good stories won't take time away from content; they are content. Well-chosen, well-placed stories can save time by focusing and clarifying your message.

**Set the stage.** Narrative organizers, such as well-known fairy tales and shared history, help learners interpret and classify incoming information. When you use each part of a story to introduce content, learners gain a strong sense of where they are in the training. This improves recall as learners associate new information with something they already know well. Moreover, the stories can double as metaphors to reinforce learning. The possibilities are limitless (and fun!). Delivering training on avoiding hidden dangers? Red Riding Hood is your girl. Or how about training on a new testing process? Goldilocks would work. She is, after all, the QA Queen (what with all that testing of porridge, chairs, and beds).

**Add a twist.** What if Goldilocks didn't flee for her life but, instead, delivered her test results to the Bear family, leading to across-the-board improvements in porridge temperature, chair strength, and sleeping conditions? In and out of the classroom, people remember novelty. When faced with something new and surprising, we wake up and take notice. Take a story, turn it this way and that, locate those "what ifs," and then surprise and engage your learners.

**Bring the fun.** Humor in your stories makes them especially memorable. Humor is also a time-tested antidote to stress, and learning new skills can certainly be stressful. There's something funny in almost every situation. Find it and inject it into your stories whenever you can.

**Make it personal.** When learners hear a relatable story, they are more apt to remember it. Personal stories engage learners and encourage them to share their own experiences. This builds a relationship of mutual respect and trust between instructors and learners.

**Keep it real.** Even when a story is entertaining, if it isn't realistic and relevant to the training, learners will notice. Rely on experts to confirm every story rings true. This ensures credibility and strengthens learners' confidence in the training – and its usefulness to them when they're back on the job.

**Trust the classics.** If you have a story to share, but aren't quite sure how to tell it, learn from Gustav Freytag, a noted dramatist. Apply his pyramid model to structure any story – from case studies to informal anecdotes – with a hat tip to classic literature and drama.



Good stories elevate training – they engage learners and breathe new life into even the most mundane topic. Crafting and sharing memorable, relevant, well-placed stories is time well spent. And, let's face it, compared to a dry procedure, designers prefer writing stories, instructors prefer telling them, and learners prefer hearing them. Everyone wins!

# Practical Tips to Select a Training Delivery Modality



*Learning & Development*



# Practical Tips to Select a Training Delivery Modality



By Emerson Client Director, Kenny Simon

(cheesy commercial voice) “Do you find yourself enamored with things that sparkle or shine? Are you often the one bringing the latest learning trend to your organization? Maybe you fancy yourself an instructional daredevil, trying to impress your boss by being the first to do something new. If this sounds like you, you could be suffering from Shiny Object Syndrome (Objectivus Shinium Syndromus). Yes, it’s a real condition, defined as the attraction to new methods that exhibit a glassy, polished, gleaming or otherwise newfangled appearance. And, if you’re not careful, you could develop a full-blown case of Innovation for Innovation’s Sake. This is a serious condition that can distract you from the bigger picture and cost you, your learning team, and your organization many hours of productivity and quite a bit of cash.”

If only it had a quick fix we could buy from an infomercial! Many of us in the learning field are always on the hunt for new ways to deliver training. We chase the latest buzz-words and trends in our industry. It’s a never-ending journey, driven by a sincere desire to improve the engagement and behavior changes our programs seek to provide. It seems a new modality (learning delivery mode) hits the market every week. Each time, we write the obituary for tried-

and-true methods like instructor-led training (ILT), eLearning, and job aids, then tout the merits of the trends: virtual learning, micro/Nano learning, MOOCS, individualized learning, gamification, social learning, etc.

Don't misunderstand me, each modality has its merits; however, as a learning consultant, I consider it my duty to walk my client through the dangers of hopping on the latest training train with little investigation. There are three steps I highly recommend whenever you are trying to land on a modality: be practical, evaluate all legitimate modalities, and conduct a proof-of-concept.

### **Be practical.**

Practicality means concern for the actual doing or use of something, rather than the theory and ideas. Why? Because business is about getting whatever you sell to the market with speed and accuracy. Very few have time to test an idea each time employees need to be up-skilled. Be practical (not to be confused with boring); keep these things in mind before selecting a modality.

- ◆ Skills – What behavior are we teaching? Are the skills regulated? Do they present a high risk or danger if the user doesn't perform correctly? How often will the skill be used? How complicated is the skill?
- ◆ Goals – What do we need to accomplish? Does learner performance need to be checked at the end of training to make sure it will get us to that goal?
- ◆ Learners – Are they rookies or veterans? Are they tech-savvy or nah? How are they used to working? Ensure the method works for the audience and their environment.
- ◆ Budget – What platform, equipment or setting do the modalities require? Can we afford to deliver training using the latest trend?
- ◆ Schedule – Do we have time to properly plan, design, develop, and deliver the training?
- ◆ Logistics – Where are the learners and how many? Is the training organization equipped to deliver and support the program? How long do we have to maintain the program?
- ◆ Culture – Ignore the culture (formal and informal) in any program targeting employees and you lose, every time.

Evaluate all modalities.

Modality	Reasons to Use It
Instructor-Led Training / Coaching	<ul style="list-style-type: none"> <li>• Soft Skills – communicating, presenting, leadership, influencing</li> <li>• Skills requiring emotional connection – team-building or mentoring</li> <li>• High risk of “system” failure, regulatory penalties, death</li> <li>• Co-located audience</li> </ul>
eLearning / Web-based	<ul style="list-style-type: none"> <li>• Hard skills – computer-based tasks, operational processes</li> <li>• Basic safety</li> <li>• Dispersed audience and tight budget</li> <li>• Activities not requiring participant interactivity</li> </ul>
Virtual Training	<ul style="list-style-type: none"> <li>• Combinations of hard and soft skills</li> <li>• Training requiring participant and facilitator interactivity</li> <li>• Dispersed audience and tight budget</li> </ul>
Micro/Nano learning	<ul style="list-style-type: none"> <li>• Material easily broken into in small units – less than 10 minutes</li> <li>• A single topic/skill performed independently while using references materials as needed</li> <li>• Mobile-friendly organization and easy access via learning portal or microsite</li> </ul>
Massive Open Online Course (MOOC)	<ul style="list-style-type: none"> <li>• Web-based/dispersed audience</li> <li>• Need for access to a wide range of topics/information for up-skilling</li> <li>• No need for pre-knowledge</li> </ul>
Social Learning	<ul style="list-style-type: none"> <li>• Peer-to-peer engagement opportunities</li> <li>• Access to organizational/topic “experts”</li> <li>• Personalized learning needs – custom, informal or on-demand</li> </ul>
Gamification	<ul style="list-style-type: none"> <li>• Need for fun, learning that doesn't feel like learning, immersion and retention</li> <li>• Audience that needs Immediate teaching moments/feedback</li> <li>• Need for friendly competition and achievement (motivation)</li> </ul>

**Conduct a proof-of-concept.**

Listen, I'm not some old fart (can I say fart in this blog?) who resists innovation - quite the opposite. I love to see organizations do something new to pull the learner in and improve the likelihood of behavior change. In my job, I see it happen quite often. But I also see clients trying too hard to force the latest thing into their program, only to have it fall flat. If you want to try something new, you can minimize the risk. Do a proof-of-concept. Pilot the new modality with a trusted audience and see what happens. Introduce your new idea as a small part of a larger program. Implement a low-fi approach to the cutting-edge method. Any of these will give you valuable information you can use before going all-in. And remember that a blend of learning modalities is usually the solution to your organization's learning needs.

New toys are fun, but choose them wisely. This is just a reminder to do what learning professionals should be doing every day – properly assessing the landscape before selecting a learning delivery method.

# The Wonderful World of Mr. Smelley



*Learning & Development*

## The Wonderful World of Mr. Smelley



By Emerson Director, Learning and Development, Freddy Mitchell

Nathan Smelley was one of my favorite teachers in school. (Yes that was really his name.) He taught Algebra 1 and 2. He stands out to me because his classes were always a blast. He delivered laughter (at his theatrics) and “aha” moments (albeit about algebra). As I started facilitating training programs, I recalled those times and tried to create a Smelley experience for my learners.

Mr. Smelley loved algebra but, more than that, he loved teaching. He loved watching his students’ eyes go wide at his antics and light up with new understanding. He would slap rulers on desks or make funny voices to illustrate his points. Not only did his methods wake us up, they said, “Pay attention - this is different!” Good facilitators use similar techniques with their adult learners. We walk around the room to address different people, use props, games, jokes, surprising images and metaphors – all to keep the room “alive.” What distinguishes facilitators from presenters is our ability to stimulate our audiences to learn. And, as adult learners get more sophisticated, we challenge ourselves to work harder to engage them. Mr. Smelley would do no less.

Another teacher of mine, Mr. Jones, taught English Literature (or should I say told us about English literature). He lectured his way through every class period. His monotone voice added to the misery. Most of us were drowsy within 10 minutes, but he didn't seem to notice. The only way he knew to teach was to tell us what to think. In contrast, Mr. Smelley would constantly ask us "What do you think that means?" Or "What happens next?" When we struggled to answer you could see his intent on his face – he resisted giving us the answer; he wanted us to think. During my career, I have learned to use the Socratic method and open-ended questions to lead participants to learning. When we create moments of discovery, real change happens. Our learning programs have lasting impact because we have helped people create new pathways to the answer in their own brains. The content is no longer just in our training materials – it lives on in the minds of our learners.

I didn't find algebra that hard. I actually loved it. But there were times that even Mr. Smelley couldn't get us to "get it." He would use his funny ways and tell compelling stories, but sometimes it wasn't enough. In those cases, we would sense his brain working to find another way. Then we could almost see the light bulb illuminate over his head. Suddenly, he was excitedly passing out blank paper for us to draw on or grabbing two yardsticks to illustrate his point. He had modified his lesson plan on the spot. We training facilitators have our guides and agendas, but sometimes they don't work like they should. Some of the best facilitators I know are those who can flex on their feet and find another path to the moment of discovery.

When we graduated, many of us said fond goodbyes to Mr. Smelley. He clearly made an impression on students like me, who learned much more from him than algebra.

Postscript: He told his classes that his wife's name was Ima and her maiden name was Lemmon, so that made her Ima Lemmon Smelley. I am not sure it was true, but I remember it decades later. Classic Smelley.

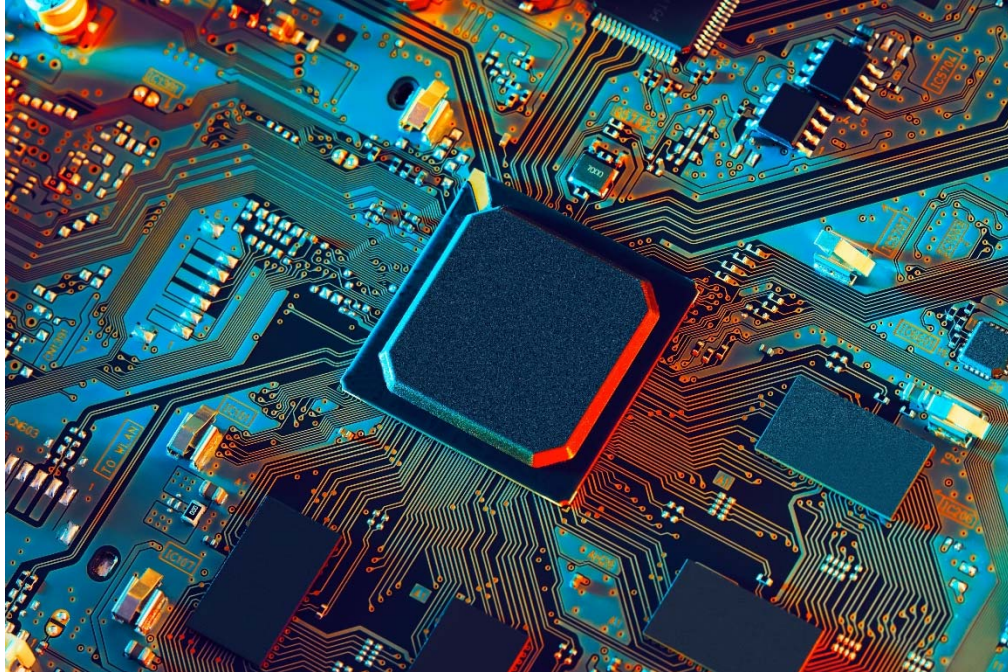


# Making the Case For New Technology



*Technology Change*

# Making the Case for New Technology



By Emerson Instructional Technologist, Michael Cassady

Have you ever seen a dog on “Fun Patrol” at the park? He looks for any other dog having fun, then bounds in and wrestles its toy away, only to get bored and walk off a few minutes later. The dog tests the new toy, realizes the toy doesn’t solve his boredom problem, and drops it. It seems that what brought joy to the hapless victim did nothing for the dog on Fun Patrol.

There’s a technology lesson in there. Just because someone else’s new tool works for them, doesn’t mean it will work for you. Organizations have different needs, and no one approach fits all. Launching a custom sales app just because your competitor has one is risky business. Maybe your competitor has a smaller footprint and needs increased exposure and sales, while your company is well established, but has trouble processing orders quickly. Increasing sales without addressing your existing process issue would only lead to backorders and, most likely, disgruntled customers.

It’s tempting to look around at your competitors, see the tech trends they’re using, and rush to keep up. But no tool helps every company – even very similar companies. And adopting the wrong tech can hurt your business more than it helps.

The takeaway: identify your needs before choosing expensive new technology. Don't start by falling in love with the tool; look at where your organization is going, what it needs to get there, and what obstacles are in the way. THEN, look for the technology to best supports that vision.

As you shop, be specific about the problem you're trying to solve. If it's not about RISK, TIME, or MONEY, maybe you don't need new technology.

Consider the case of a retail big box company whose problem is overstocking products. They could choose to:

- ◆ Implement a new Point of Sales (POS) system to record more accurate sales data patterns, thus reducing the RISK of overstocking low-selling products that might go bad on the shelf.
- ◆ Implement an Order Management System (OMS) to identify which stores are over- and under-stocked on a certain product, helping them proactively shift inventory between locations. This would reduce the TIME to clear overhead and bring in new, more saleable products.
- ◆ Distribute tablets to managers, allowing them to deliver flash sales on overstocked products directly to the customer on the floor. This would bring in more MONEY through increased sales and reduced overhead.

Each of these is a viable option, as each addresses a need and solves for either Risk, Time, or Money.

Ingredient	Description	Example A (POS)	Example B (OMS)	Example C (Tablets)
NEED	<i>The problem at hand</i>	Too much overhead		
VISION	<i>The desired end-state</i>	Efficient stocking		
SOLUTION	<i>The means for getting there</i>	<u>Point of Sales system</u>	<u>Order Management System</u>	<u>Tablets for every salesperson</u>
IMPACT	<i>Typically, <b>risk, time, &amp; money</b></i>	Gather accurate customer order data ( <b>Risk</b> )	Shift overstocked inventory to other locations ( <b>Time</b> )	Push overstock sales instantly to the floor ( <b>Money</b> )
COST	<i>The required investment</i>	\$\$\$	\$\$	\$\$\$\$
RISKS /MITIGATIONS	<i>Deployment dangers &amp; solutions</i>	Configuration / Manual data entry	Info blackout / Phased cutover	Connectivity /Infrastructure

Once you have identified your organization's needs and have a tool in mind, make your case for the solution. We have a recipe for this. Let's use our big box store from the scenario above as an example.

Breaking down the case like this tests the tech's ability to address your need. You might find your first choice doesn't quite align with your need and vision, and that's ok. Keep looking; you will find a fix – technical or otherwise — that fits. No tech tool is a cure-all, and the solutions are not always as useful and intuitive as the tech company might promise. ([See my other blog post for more on this](#)).

When you land on a solution that's perfect for your needs, there is still work to do. First up: selling your idea. Leadership and other stakeholders will have to buy in and learn how to use the system. Constructing your case, as described above, will help you talk about the solution to your organization.

This kind of thoughtful analysis is well worth the investment of time and energy. Do it right, and you won't fall for the newest, shiniest toy. You'll be well on your way to solving your business problem and strengthening your organization.

# Prepare For the Cloud with Bootcamp Training



*Technology Change*



## Prepare for the Cloud with Bootcamp Training



By Emerson Consulting Manager, John Grave

It seems like every organization is headed to the Cloud. If your organization is not there yet, it soon will be. As a change management professional, you might be responsible for helping them get there. One of the best ways you can help your organization get ready for its Cloud journey is to help prepare its resources. Consider a Cloud Bootcamp training approach.

If your organization is like most, they will probably take small steps to migrate systems to the Cloud. Because all systems won't go at the same time, you can focus on the impacted parts of the business before their migrations. Consider creating a three-day Bootcamp training session designed for business unit migration teams. It's called Bootcamp for a reason – like the military, everyone takes it to learn the basics...the things they must know to get started.

The migration teams might consist of technical resources (e.g., developers) and non-technical/business resources (e.g., product owners, business analysts, etc.). The Bootcamp will get the right people up to speed on cloud fundamentals and any organization-specific information you need the team to know.

### **Bootcamp topics might include**

- ◆ Cloud Fundamentals – IaaS
- ◆ Cloud Fundamentals – PaaS
- ◆ Database Migrations

Cloud fundamentals typically include a lot of technical information so of course it's important that technical team members attend. But it's also important that the non-technical members take the training. Business resources and supervisors are responsible for growing organization capability. The first step is to understand what the organization will be responsible for in the new cloud environment- this will help them make decisions after the migration. Make sure at least one training module gives an overview for non-technical team members.

Use your application migration plan to determine who needs to go through the Bootcamp and when. Since this is a new journey for your organization, consider hiring consultants who are cloud experts to develop and deliver the training. Use a train-the-trainer approach and spend the first few weeks getting your people (who will eventually act as trainers) smart. Those individuals can begin by acting as secondary instructors...and eventually lead the Bootcamp. At that point, you can release your external experts and use your new internal capability.

Most technology training efforts cover a four-to-six-week period, so be prepared for the Bootcamp to span months, if necessary. Good luck and see you on The Cloud!



# Three Reasons Your Employees Don't Want Your New Tech



*Technology Change*

# Three Reasons Employees Don't Want Your New Tech



By Emerson Vice President of Consulting, Mark Bashrum

Why won't users just do the right thing? The software implementation went well, the tech is flawless, and the helpdesk is ready to go. Still, users use manual workarounds and refuse to embrace the new system. No doubt, bad tech will kill change, but good tech doesn't guarantee success.

It's heartbreaking to watch, but we see it all the time. Unfortunately, it's the IT team that usually takes the hit. The assumption is that if the technology worked, users would flock to the new system in droves because, hey, it's better. So why don't they? There are three common reasons.

**People fear loss much more than we value gain.**

Research tells us this. In one experiment,\* researchers gave each subject \$50 and two choices:

Keep \$30 *or* Flip a coin to keep or lose the whole \$50.

The result: 43% of subjects chose to take the gamble. Then, they gave a second group of participants the same choice, only with different wording:

Lose \$20 *or* Flip a coin to keep or lose the whole \$50.

The new result: 62% of subjects took the gamble. The point is that we have a strong aversion to feeling a loss, regardless of the reality.

When critical systems change, users fear a loss of competency. They know the current system and, even if it is difficult to use, they know they can do their jobs. The conceptual benefits of your new system won't matter if people don't feel competent using it before the cutover.

**Tribal knowledge is another reason users hold on to an old process.**

Believe it or not, there are still tons of command-line, green-screen, or otherwise grossly outdated systems running out there. We come across them all the time. And, like a bad movie, these applications often have a cult following. The voices of new hires and millennials, shocked by the user experience, scream for modernization. Their voices, however, are often no match for a quieter but much more influential group – seasoned employees who hold the organization's tribal knowledge.

There is a great deal of security associated with knowing something that is both critical to the business and difficult to replicate. In economics it is referred to as a "barrier to entry," and it is a key strategic advantage. If your competition cannot easily replicate your products or services, and those products and services are in high demand, then your business is going to do very well. The same holds true for those employees who possess your organization's tribal knowledge. They have security. They are often further along in their careers and have paid their dues to get where they are. Now you want to strip that away and make them start over, with a new process. Can you blame them for wanting to maintain the status quo?

We need to help these employees — not only to transfer their skills to the new system, but also to reinforce their value to the organization. Whether they are working in the old system or the new one, their real value lies in their intimate understanding of the business and the relationships they have formed over the years. We need to help them understand that embracing a new system does not change these strengths.

**Your users, like the rest of us, are anchored in the past.**

That's another reason they resist change. Nine times out of ten, you've made some previous attempt to replace an outdated system. It's rare that we are brought in to help on our client's

first try at an upgrade; it often takes failure to understand that successful technology change needs a lot more than good project execution and good technology.

Employees remember the failure, even if it was years ago. When you propose a new system, that failure is their point of reference. It's easy for leadership to dismiss — it happened years ago and there was lack of budget or commitment, or the technology back then was not nearly as good. But don't underestimate the past. It informs employees' perspective on your change initiative. Maybe they feel that, since the last initiative failed, it's ok for this one to fail — they can just do whatever helps them ride this one out. You need give them a new point of reference, one that models success and provides no option for failure.

Armed with this knowledge, what should you do? Make sure your project has strong change management, and that the team understands these three principles. I've always believed the CIO should be the organization's strongest advocate for change management and ensure that every technology implementation has a dedicated change team — if for no other reason than the CIO has the most to lose.

It's not a mystery. There's no excuse for not knowing this. There are well founded and observable reasons users don't immediately embrace new technology. We need to understand how human nature works for and against us, and use that knowledge to help the organization move past these barriers to the successful future promised by the new technology.

*\*Published in Science and described in Dean Buonomano's [Brain Bugs](#)*

# Thanks for reading!

Check out the Emerson website: [www.emersonhc.com](http://www.emersonhc.com)

