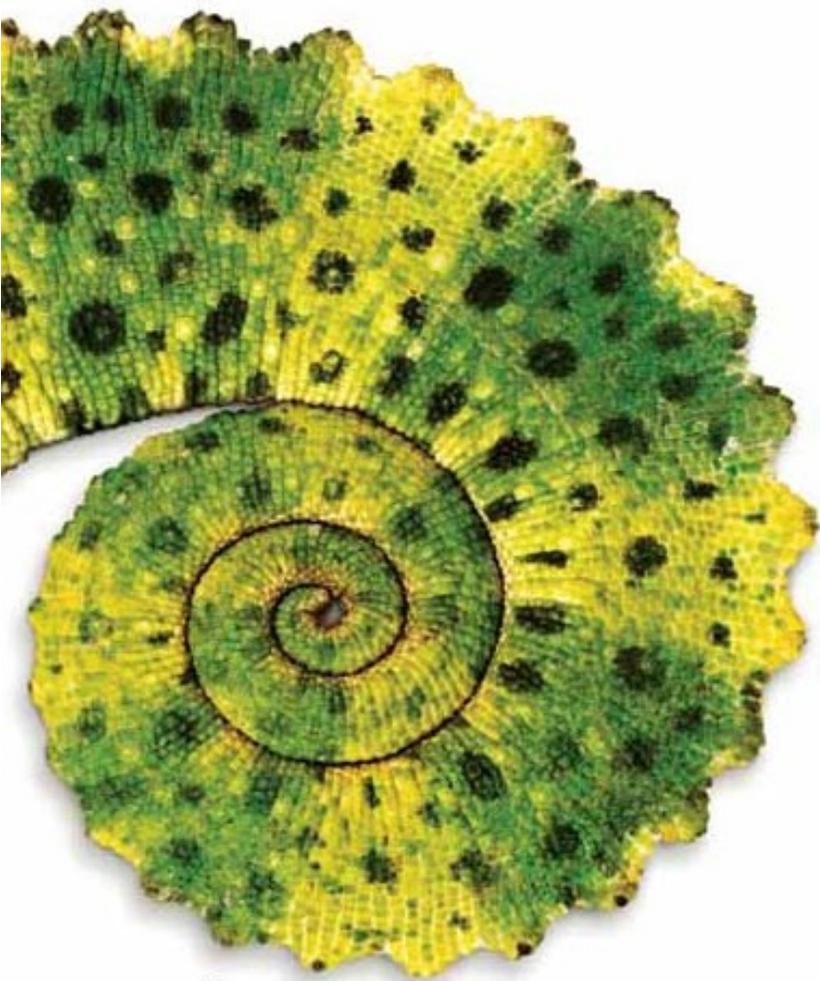




# The Emerson Blog, Volume 1

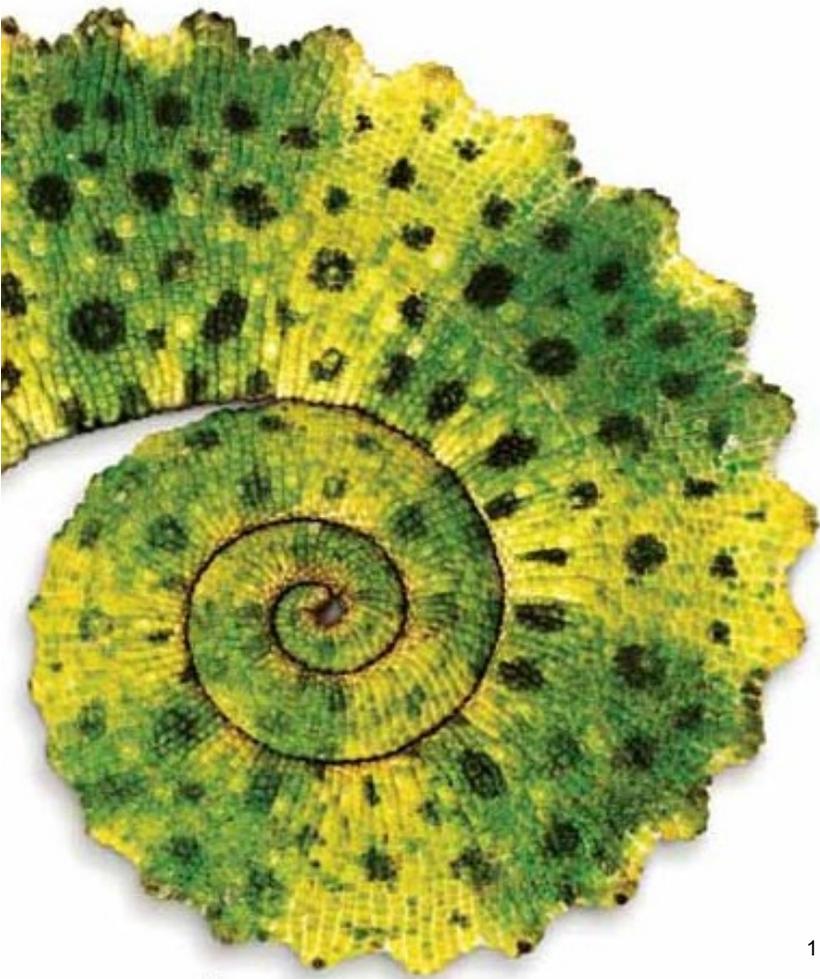
Some of our favorite blog posts on change, learning and technology



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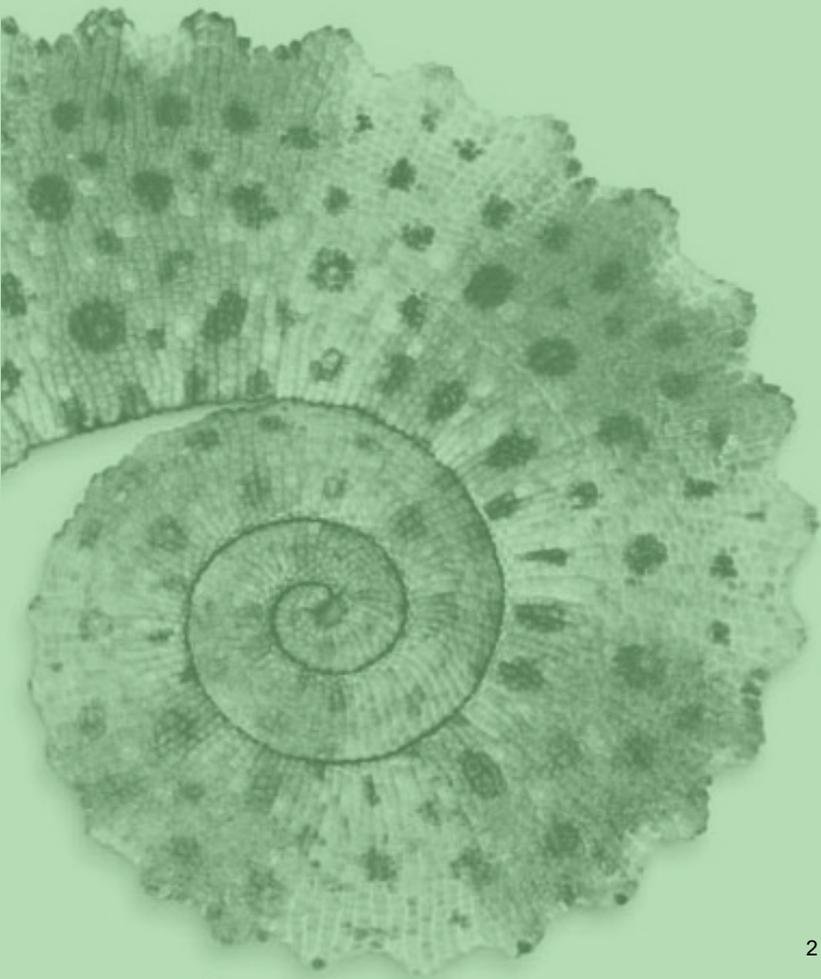
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# Change Management



# Change Management Strategy

How to Hire the Right Consultant



# Change Management Strategy: How to Hire the Right Consultant

*By Emerson CEO, Trish Emerson*



Years ago, I met a surly executive, whose staff actually lit his cigar and handed him scotch whiskey as he entered the hotel lobby for our meeting. He greeted me with, "So, you're the touchy feely person."

That's our field. Touchy feely. Soft and emotional. That perception creates two problems. First, it attracts people who don't have the disciplined background to be effective. I once facilitated a panel for a well-regarded professional organization. One of the panelists had a website promoting both her change practice...and her massage therapy business.

Second, this perception creates chaos for those trying to buy credible change services. Who should we trust? Our IT implementer? A noted author? An academic? Someone who is certified? Certified by whom?

The result? Wasted time, money, and credibility. Another project implodes because the employee side of the system/change was handled poorly, and the organization learns once again that failure is acceptable.

We know the required questions to ask: What is your experience? Who are your references? How long have you been in the field? Are you the one who will actually do the work? But these questions do not separate the best from the rest.

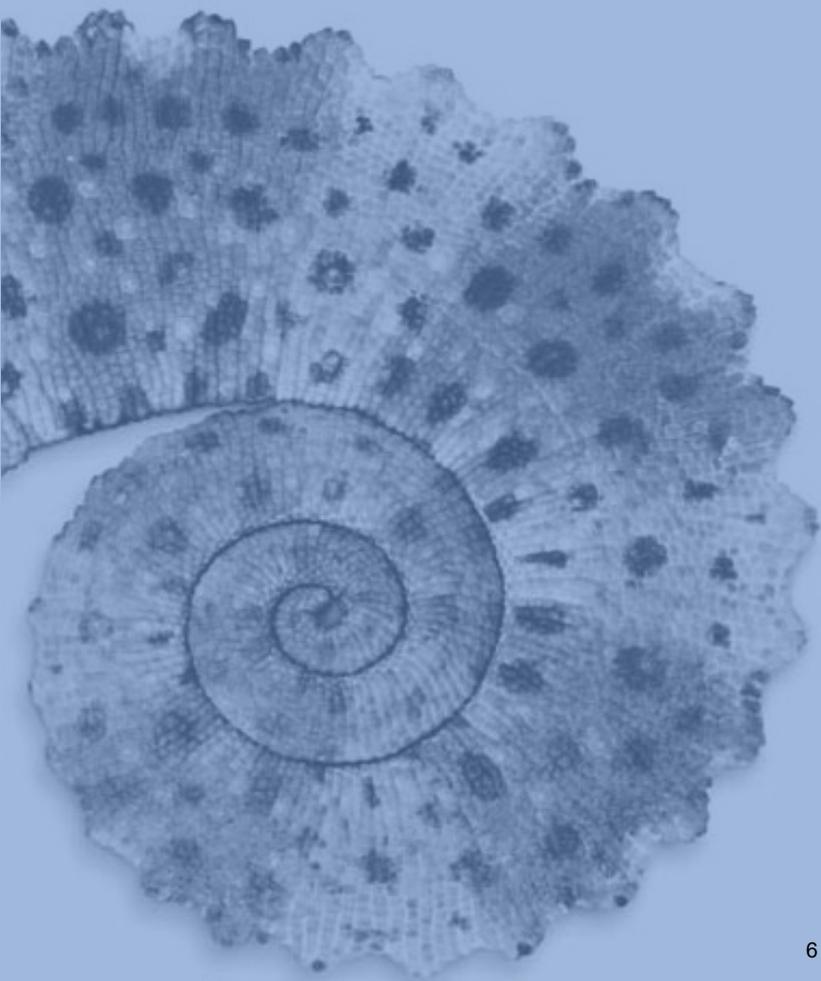
Here is what you should also ask to find an effective change consultant.

1. **Are you (the IT partner) willing to “throw in” the change work for free or at a high discount?** A “yes” tells you the company sees the people side of the work as secondary - as a commodity - not a strategic imperative. This perspective affects who they hire, how they train, their retention, etc. In other words, you won't get a strong change management team. In fact, many IT implementation firms have a habit of dismantling their people practice and associated training programs then rebooting them when the market notices. Ask how long each proposed change team member has been with the company, and in what divisions – that should give you an idea of when the company last revived their change management practice.
2. **Are your change practitioners full-time employees or a network of affiliated consultants?** This speaks to the vendor's commitment to the field and their investment in developing their people and solutions from one project to the next. Beware also of companies with a large rolodex of talent – a wide net shifts the screening process from the vendor to you.
3. **What am I buying from you, exactly? Are they methodology wonks, who love to show detailed processes and models?** Far from being an assurance of effectiveness, this means you are buying activity rather than outcomes - usually slide decks, documentation, and “deliverables.” Your consultant should be talking about your business outcomes, not training plans and communications vehicles. The consultants with degrees in communications, learning, marketing, psychology or economics – the fields devoted to human behavior – are best equipped to focus on the behaviors that deliver the results you want.
4. **Do you do strategy, implementation or both?** Beware the firms that do strategy only. Those who implement their strategy learn what works and what doesn't. Companies that focus exclusively on strategy wash their hands of accountability. They tend to blame poor outcomes on bad execution. If you want results, focus on change management partners who take ownership for your success.
5. **Will you tell us about the outcomes we will see?** You are not hiring a company to do change management; you are hiring them to deliver a promise someone made about your initiative. That usually looks like faster implementation, people using the system, increased revenue, undisrupted customer service...real benefits, clearly stated, with metrics attached. Having a laser focus on your outcomes matters. Your new partner should be able to express that clearly, in plain language, and help you stay on-message to your organization. In the midst of a difficult implementation, words like “pivot,” “unpack” and “value-add” will drive you and your organization crazy.

Answering these five questions will get you better results and some peace of mind. That leads me to the last tip. Any big initiative is stressful, so the most important question is: do you like the people you are meeting? If so, you've given yourself a gift – someone who makes the inevitable tough times lighter.

# Change Management Strategy

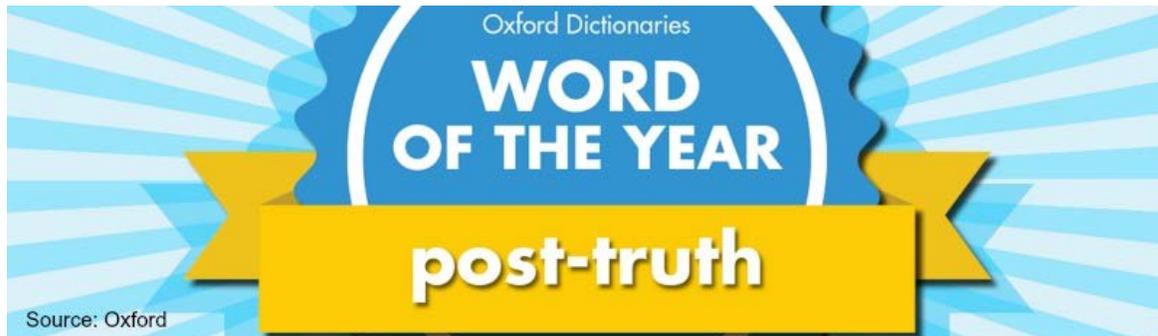
Living In a Post-Truth World



# Change Management Strategy: Living In a Post-Truth World

## What Leaders Can Do Now

By Emerson Vice President of Consulting, Christian Hasenoehrl



The Oxford Dictionary's 2016 word of the year is "post-truth." The expression has been around for a while, but usage spiked after Brexit and throughout the U.S. presidential election.

President Obama reminded us in his farewell speech that we now live in a post-truth world. "Increasingly we become so secure in our bubbles that we accept only information, whether true or not, that fits our opinions, instead of basing our opinions on the evidence that's out there." Referring to climate change, the president lamented that "without some common baseline of facts - without a willingness to admit new information and that your opponent might be making a fair point and that science and reason matter - we're going to keep talking past each other."

This problem is not new, it's just come to a tipping point. "Confirmation bias" is a tendency to perceive information in a way that confirms one's preexisting beliefs. The term was first coined by English psychologist [Peter Wason](#) in 1960, and has been supported by many researchers since then. Daniel Kahneman was the first psychologist to win a Nobel Prize in Economics along with his colleague Amos Tversky, for their work in decision-making and behavioral science. Kahneman pretty much predicted our post-truth predicament and fake news obsession in his 2011 book, *Thinking Fast and Slow*, "Contrary to the rules of science, people seek data that are likely to be compatible with the beliefs they currently hold."

In other words, when we read an article or an email, watch the news, or hear a presentation, we unconsciously cherry-pick data and focus on information that agrees with our existing position. And we dismiss information that doesn't fit that position. Dr Kahneman also observed, "People generally look for a plausible scenario that conforms to their understanding of reality. We are unable to imagine...installing a third-party president." It's safe to say most of us did not imagine a Trump presidency a year ago.

The rise of unabashed “post-truth” thinking is more evident than ever before. People effectively cease to see what’s in front of them. For example, even though the earth gets hotter every year, many people deny the existence of climate change. Many simply could not imagine a Trump presidency, so they ignored signs to the contrary.

Some in the news arena have taken advantage of this bias, intentionally publishing “fake news” and highly one-sided content, targeting eager audiences. This appeals to our confirmation biases – there’s no need to swat away information we don’t agree with; it simply isn’t there.

Most of us aren’t in a position to influence news organizations or political dynamics. But many of us are in business leadership positions. We live in times of fast and fundamental transformation. During then President-Elect Trump’s recent news conference the stock market fluctuated wildly as he singled out the pharma, auto and defense industries. Cutting defense spending; taxing infrastructure investment in foreign countries and slashing pharmaceutical prices are all on the table.

Is your leadership team ready to manage in a post-truth world? I’ve spent over a decade working with corporate leaders to apply behavioral economics to transformation. To survive, we will have to get employees to change the way they work, probably more than once. Managing big change is already a tall order, but understanding behavioral bias can help us navigate these choppy waters.

What can we do based on our understanding of confirmation bias?

- **We know** employees will approach any change with a bias – for or against. We know that the bias will act like a filter – causing people to accept and believe our messages only if they fit that bias. Often their bias is based on history – they will look for experiences that are similar to whatever it is we want them to do. The last system implementation? The last wave or policy changes? The last layoff? **We should** give them the right bias. Get ahead of it - offer employees the thing we WANT them to compare this change to. Compare the change to something that went well. Or tell a compelling story of a company that did the same thing, and came out shining. “Remember BigBang 2010? We all pulled together and it was a great success – our company grew and everyone was pumped. Now get ready for BigBang 2018! We’re getting ready for a whole new level of excellence.”

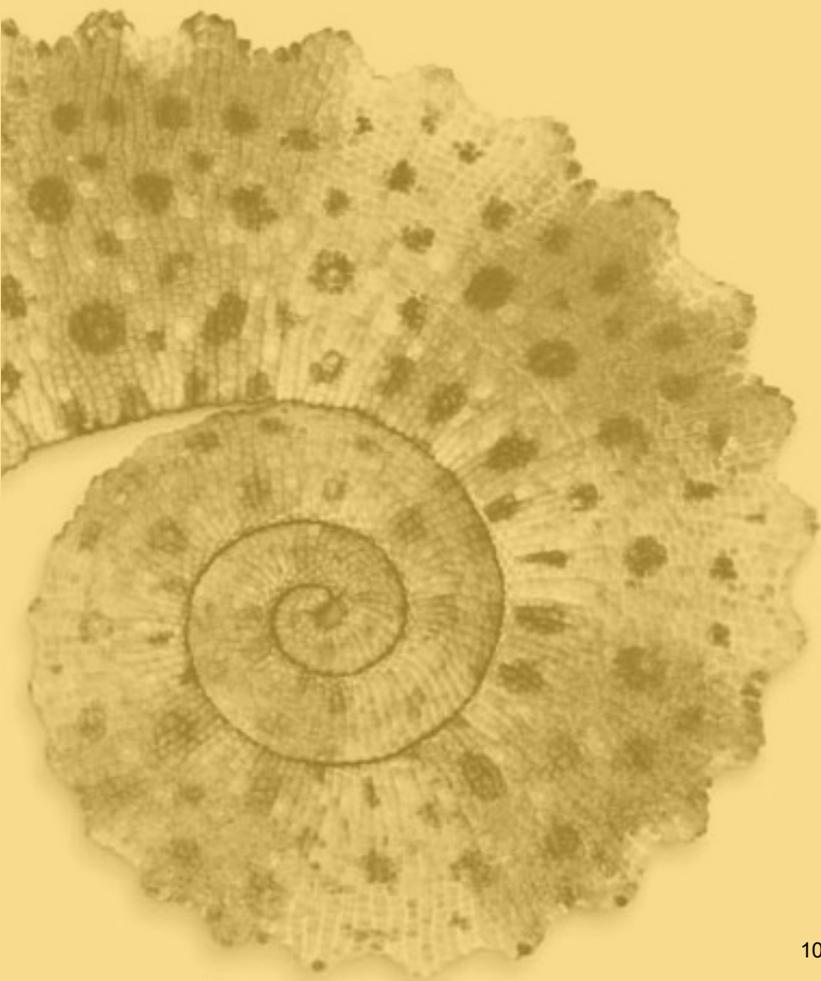
- **We know** employees will also have a bias based on the team involved. **We should** engineer the face of the change to use that bias. Did consultants lead the last painful transition? The bias: consultants are bad. No amount of talking will change that – your praise of this new consulting firm will bounce right off them. So put popular and influential employees out front. Did employees learn about that system that failed through all-hands PowerPoint presentations? The bias: big presentations mean bad news. You could put the best news in the world into a deck and they’d still be suspicious. So use a channel they already like – maybe their own small team meetings, or the celebratory company off-site.

Michael Lewis, in his new book, the Undoing Project, brought a fresh perspective to Kahneman and Tversky’s work. He writes that when people become attached to a theory, they fit the evidence to the theory rather than the theory to the evidence. The key to a post-truth workforce is not a barrage of facts and rationale. Don’t combat bias directly – use it strategically and everyone wins.

*Christian is Vice President, Consulting for Emerson Human Capital. Christian has led enterprise wide transformational retail consulting projects for Gallup and Accenture and worked in global development for Walmart and Metro AG.*

# Change Management Strategy

How We Turned HR Into Change Agents



# Change Management Strategy: How We Turned HR Into Change Agents

*By Emerson Human Resources Director, Shiva Krishnan*



We live in disruptive times. New tools, new markets, new policies, new trends, new clients, new employees... Every successful organization grapples with a wide array of changes, big and small.

HR professionals like me are responsible for the employee experience. We continually design and implement people processes to support our employees through a landscape of constant change. But good policies and processes are not enough. We need to start thinking of ourselves as change agents.

Let me tell you a story close to my heart. It's about the launch of a leadership development program to improve the team-building behaviors of a company's leaders, world-wide. The program was a smashing success (unlike many past similar projects). Why? Because HR made some significant behavior changes of its own.

1. From understanding business needs to **forecasting them**.

Having ears to the ground, HR could see early on that the business model was shifting from individual contribution to team performance. Soon, leaders would have to work with multiple global cross-functional project teams and get them to collaborate quickly to drive business outcomes. Because we anticipated this need, the program was not merely a reaction to a problem; it was a proactive solution.

**How we did it:** We claimed a “seat at the table” and participated in business decisions. We held regular meetings with employees and managers and asked the right questions. We also conducted frequent pulse surveys to gauge the mood of the employee base and respond.

## 2. From tracking metrics to **owning Key Performance Indicators (KPIs)**.

The HR team committed to employee engagement (a company KPI) instead of focusing on tactical metrics like total training hours or training feedback scores.

**How we did it:** We kept organizational goals front and center during every conversation and work session. We brainstormed with our clients to identify the right HR success metrics achieve employee engagement and to drive the desired employee behaviors. For example, training didn’t end in the classroom but was followed by simulations and mentoring to ensure that the learning stuck and leaders managed their teams optimally.

## 3. From understanding diversity to **fostering inclusion**.

Even though corporate headquarters was in the U.S., the move to team performance was global. We knew many typical elements of training and communication didn’t resonate globally, so we paid special attention to that.

**How we did it:** We crunched the data to identify the diversity numbers. We then used the quantitative results to make the program culturally inclusive. We knew that, for example, employees in other countries might be alienated if we continued to use U.S. baseball metaphors. So we asked our geo stakeholder to share their stories and metaphors, then applied the lens of local culture to all experiences.

## 4. From following HR trends to focusing and executing the **most relevant trends**.

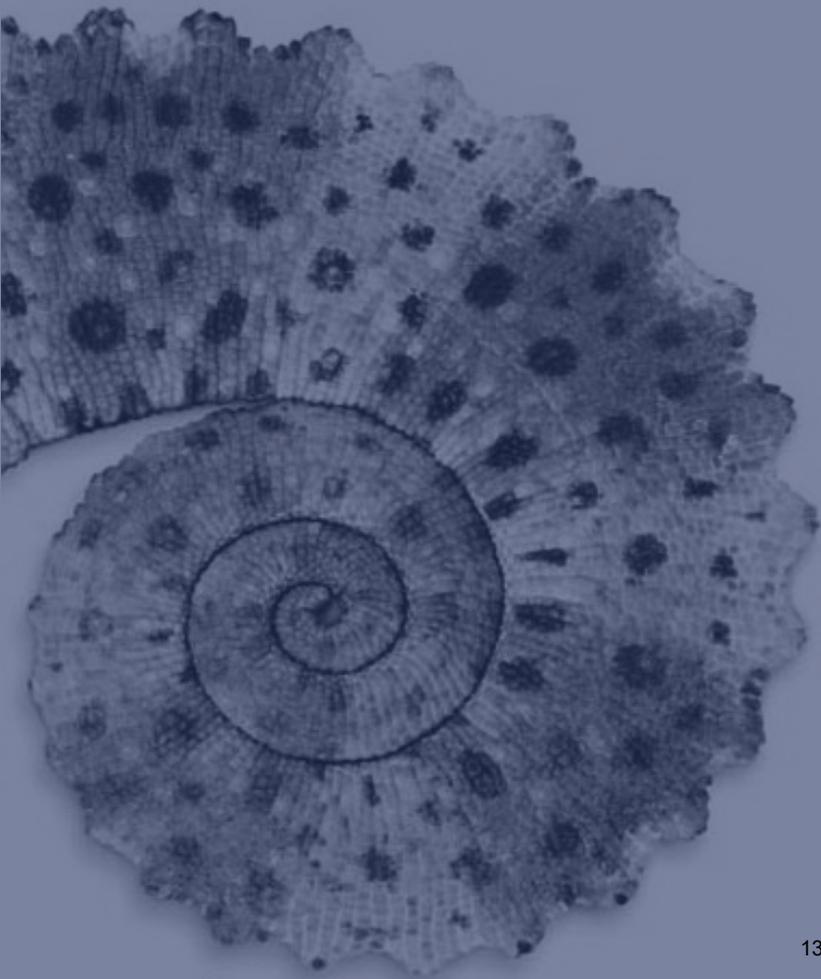
The HR team had a good sense of multi-generational workplace and digital revolution but we decided to thoroughly examine how these trends impacted the company and how best to manage them.

**How we did it:** We read the research and reached out to networks and business stakeholders to get their input. We investigated trends and analyzed impacts. These findings guided all relevant HR actions. We made sure the communications, training and tools we rolled out resonated with the target audiences. For example, we used the latest technology platform to engage digitally savvy millennials who were primed to be future leaders.

As we became more involved with company strategy and our stakeholders, we better understood our pivotal role in all organizational change. HR is responsible for promoting employee behavior change. Sometimes it’s important to start with ourselves.

# Change Management Strategy

Set Up Your Project for Success



# Change Management Strategy: Set Up Your Project for Success

By Emerson CEO, Trish Emerson



*"You have one opportunity to create a first impression."* This truism is particularly relevant for major change initiatives.

It's human nature to wait – to reserve support until you see whether a program will be successful. If it reeks, the team takes the blame. If it's got legs, there are 10,000 owners. Establish that sense of success in the first three months – immediately after the initiative has been blessed and announced. That's the window of opportunity to create adoption and momentum for the change.

Here's what must happen:

First, create reference points. Describe what this change will be like, and what it will not be like. We compare every new experience to what we already know. Comparing is a hard-wired survival skill: Will this experience bring food or death? It's absolutely critical to create the right comparison, or our stakeholders will create it for us.

Which projects had that sheen of victory? Describe how this new change is like those. Which left a bad taste behind? Describe the critical differences between your initiative and the duds. Be specific. Tell stories. As soon as it begins, plant your project on the right side of your organization's history.

Years ago, a major retailer hired me to help implement PeopleSoft. For the third time. And guess what? Virtually every stakeholder I encountered asked the same question: "How is this different from the other implementations?" In the absence of the right comparisons, people had decided this project was like those that had failed. I was in a defensive position and damage had already been done. Since then, I've learned it's more powerful to find positive examples and metaphors that resonate with my stakeholder groups. I jump into that space they're trying to fill, and provide the right comparisons. It changes the conversation.

Second, capture those who are already “all in.” Every organization has a small percentage of people who are weirdly and enthusiastically drawn to anything new. They are the daredevils — the first penguins to plunge into the icy Arctic; if the daredevils aren’t devoured, the early adopters enthusiastically follow. Identify those who might be most positively predisposed to your project, and give them a feel-good interaction with the change. It’ll tip organizational momentum in your favor.

Third, use “operant conditioning.” Define the trigger, the behavior and the immediate reward. A trigger is the context that causes a person to respond in a particular way. The behavior is what we want people to do in response. The reward is anything good – positive feedback, a happy interaction, or a treat. According to Dr. Edgar Schein, if a group engages in a new behavior, and has an immediately positive experience, they will repeat it. If they repeat it often enough, their behavior creates culture. Driving behavior through conditioning directly impacts culture and enables the ongoing success we’re looking for.

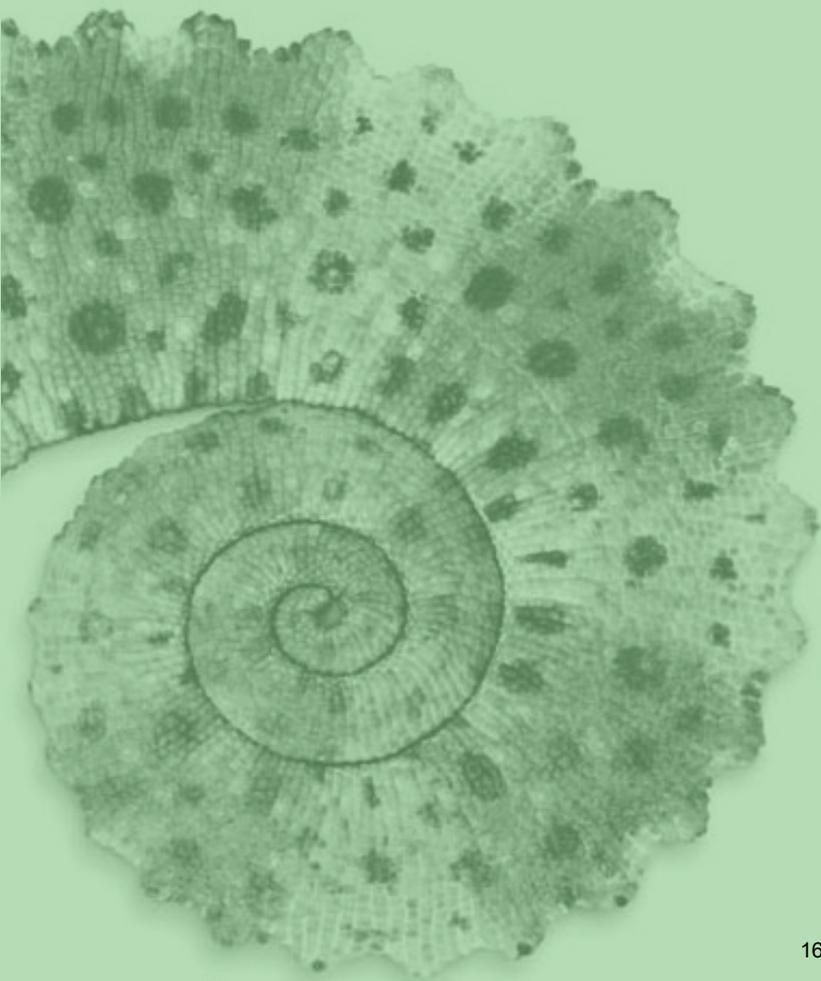
We can actually design adoption and momentum for our change. Defining reference points, getting the early adopters, and rewarding the right behaviors – regardless of the change – creates that early glow of success.

*“A person with a new idea is a crank until the idea succeeds.”* Mark Twain

*“Success is a science; if you have the conditions, you get the result.”* Oscar Wilde

# Change Management Strategy

Seize Opportunities to Shift Resistance to Positive Change



## Change Management Strategy: Seize Opportunities to Shift Resistance to Positive Change

By Bettina Rousos



“What if we don’t change at all ...  
and something magical just happens?”

A while back, I started a project at a mammoth global client. They had just gone through a merger.

Ok, not “just.” It had been five years - but you’d never have known it. The us/them dynamic between the two original companies was alive and well.

To make things more interesting, they were in the middle of a full SAP implementation. Anyone who has been through a big ERP project knows that it’s a huge change management effort, touching process, technology and people. No one looked ready. Management didn’t walk in the hallways; they ran. Everyone seemed breathless and unsure.

My team and I had been brought in to conduct a straightforward needs assessment workshop. Given the environment we encountered, I realized we had to change our plan. Soon after we started the first session, we put our agenda aside and listened. By the end of the session, they were in a more productive place. Here’s why.

**They got it out.**

The group was made up of employees from both original companies. They all had issues with the merger and with the imminent ERP. But it became clear that each person had vented only to those on "their own side." For the first time in five years, the enemies looked at each other and spoke about the issues that had been troubling them. They had to say "you" instead of "they." And after one perspective had been expressed, those on the other side had a chance to listen and respond.

**They were able to focus on the differences that mattered.**

By talking directly to each other, they were able to define their many differences. But then they saw that some of those differences weren't relevant to what they wanted for the future.

**They confessed.**

At one point, someone mentioned that when he tested the new SAP system, he found what he considered to be glitches. He proudly described an intricate workaround he had put in place. His confession opened up a conversation; many others revealed that they had also constructed ways to get around SAP transactions and processes. This created a bond between the two sides. It also started an honest conversation about why workarounds would ultimately fail and keep them from what they wanted.

**They had an epiphany.**

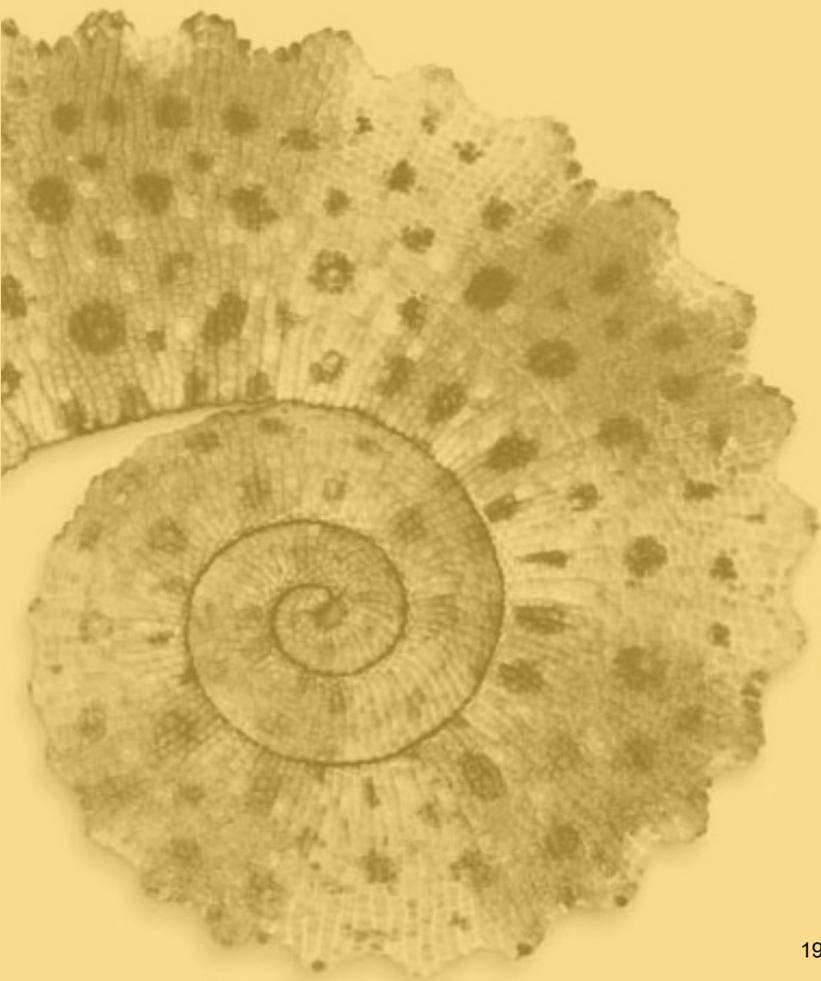
They realized it couldn't get any worse. The suffering of these two groups was real. They were working in a state of chaos, confusion and stress. I wondered aloud if maybe participating in the needs assessment and contributing to a good implementation might actually help. "Well, I guess it couldn't make things worse," said one participant. Another said, "Yeah. Let's get this over with."

Score!

While I can't pretend they were enthusiastic about the big change ahead, there was a clear shift: from active resistance to reluctant positive movement. We hadn't yet touched our agenda, but we felt we had accomplished a lot.

# Change Management Strategy

The Dubs Are Culture Kings



## Change Management Strategy: The Dubs are Culture Kings

By Emerson Chief Operating Officer, Cathy Quon



I admit that I only started paying attention to the Golden State Warriors two years ago. But I was glued to the TV this basketball season. KD! Steph! Klay! Draymond! And my favorite, swing man Iggie —Andre Iguodala.

But my real hero is their coach, Steve Kerr. Thank you Joe Lacob, Peter Guber, and Bob Myers in the front office for funding this super team, but Kerr built and fostered the winning culture.

When interviewed, every player talks about teamwork and playing with joy. It's no wonder that they led the league in most assists per game. And even though Kerr is too humble to take credit, most sports pundits attribute the winning culture to him. Another franchise could put great players on one team but would the team be as strong as the Warriors without the special culture? Nah.

We know that creating or shifting a culture is often difficult, if not impossible. Here are some change management concepts Coach Kerr used probably without even knowing it:

1. **Led by example** by sharing the spotlight. Kerr consistently focused on his team, not himself. For example, when Kerr was too ill to coach and assistant coaches Luke Walton (2016) and Mike Brown (2017) had to step in, he gave them full credit for their decision-making and the wins.
2. **Used early adopters** by showcasing selfless players like Steph Curry and Klay Thompson. Yes, they're talented players but they're not showboats; they're living testimonials to Kerr's emphasis on teamwork. The "Splash Brothers" were part of the recruiting posse that convinced Kevin Durant to join the Warriors this season.
3. **Celebrated small wins** by giving opportunities to younger players and patting them on the back for their efforts (even if they screwed up occasionally).
4. **Accepted diversity** by managing the very passionate, soon to be crowned Defensive Player of the Year, Draymond Green. Not everyone has to fit the culture to the nth degree. Some dissention and variety are healthy.
5. **Created a movement** by living the Warriors' tagline "Strength in Numbers." He optimized the team and kept everyone ready to contribute. When KD was out for 19 games, others - including the bench - jumped in to fill the void. During this period the Warriors still won 15 of 19 games. "Strength in Numbers" also applies to the fans. People could "hear us roar" from all parts of the San Francisco Bay Area.

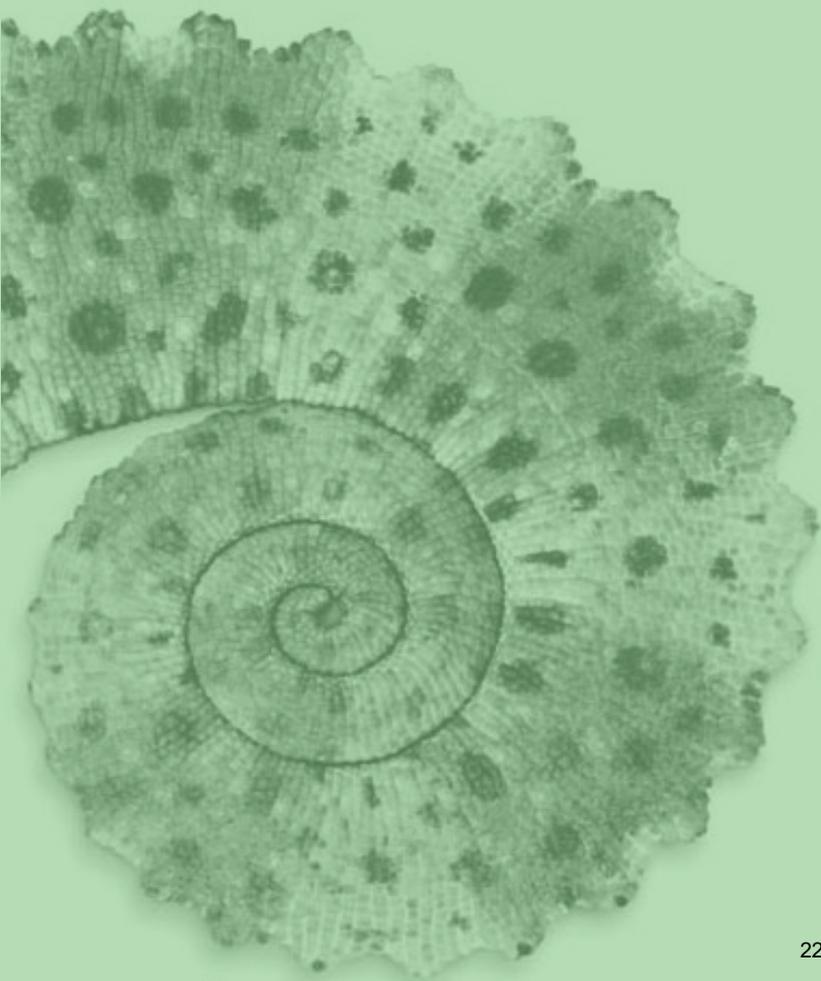
A recent Harvard Business Review article\* says, "...culture...has to live in the collective hearts and habits of people and their shared perception of 'how things are done around here.'"

And that, ladies and gentlemen, is how the Golden State Warriors won their second NBA title in three years.

*\*Changing Company Culture Requires a Movement, Not a Mandate by Bryan Walker and Sarah A. Soule, June 20, 2017*

# Change Management Techniques

What Do Good Project Sponsors Do?



# Change Management Techniques: What Do Good Project Sponsors Do?

*By Emerson Consulting Manager, John Graves*



Are you a project sponsor? Are you a good one? Solid change management means identifying the right people to sponsor a project – the right role...the right qualities. Yet, often, those “right” individuals accept the role of sponsor and then sit back and watch the program. They attend a meeting when asked. They take action on an issue when prompted.

If that sounds like you, you are not a good sponsor. Don’t worry, you can be one. You just have to understand that it’s not a passive role. Actually, it’s a very dynamic role, if you’re doing it right. A good sponsor does these things (and more), throughout the lifecycle of the project.

Want to be a stellar sponsor? Here's what you should do:

### **1. Identify and Resolve Issues**

Don't wait for your team to uncover issues. Take an active role in identifying and resolving problems. And tackle as many as possible before they become problems – risk mitigation is an essential part of your job.

For example, resources are common roadblocks. Be proactive; leverage your influence to grab the best people in your company for the team. When the team says they are understaffed in an area, listen. Bring in additional resources, as needed. And resources are not just human. Help the team get the facilities, technology, funding and organizational support they need.

*Bare Minimum Tip:* Review risks and issues once a month.

### **2. Communicate**

Sponsors should not only receive communication from the project team, they should be active communicators on behalf of the project. Your job is to be on message, keep the company on message, and create the sense of urgency that maintains project momentum. Before you can communicate a message, you have to have a message. Work with company leadership to make sure all understand the essentials: why is the current state broken, what the solution should be, what action the company is taking, and what the result will be.

*Bare Minimum Tip:* Contribute at least one key message in monthly project communications sent to all stakeholders.

### **3. Acknowledge the Good and the Bad**

Good sponsors communicate the positives and negatives of the change. There will be pain points. Good sponsors make tough decisions to move forward...to pause...to change directions...or to stop. As the project team discovers the impacts on stakeholders of those decisions, it's your job to communicate them.

These are great moments to keep your company's culture in mind. Have you done a culture assessment? If not, you should. If you use words and examples that resonate well with employees, bad news won't stall your project.

*Bare Minimum Tip:* Don't hesitate when you communicate the "not so positive" news. Sharing the truth before alternate stories circulate earns you trust and credibility with stakeholders.

#### **4. Review Progress and Support the Project Team**

Good sponsors stay on top of project milestones at all times. They review status and understand what the project team needs to be successful.

You are the face of the project to your organization. So if there delays to communicate, new resources needed, or changes to the solution remember that the buck stops with you. Don't suggest the team has stumbled; keep the company's eye on the results you all want.

*Tip for Sponsors:* Once each month, plan to attend a project team status meeting to hear directly from those who are doing the work.

#### **5. Endorse the Project**

Part of your role is cheerleader. Goals and benefits should be on the tip of your tongue, and there's no substitute for authentic enthusiasm from you.

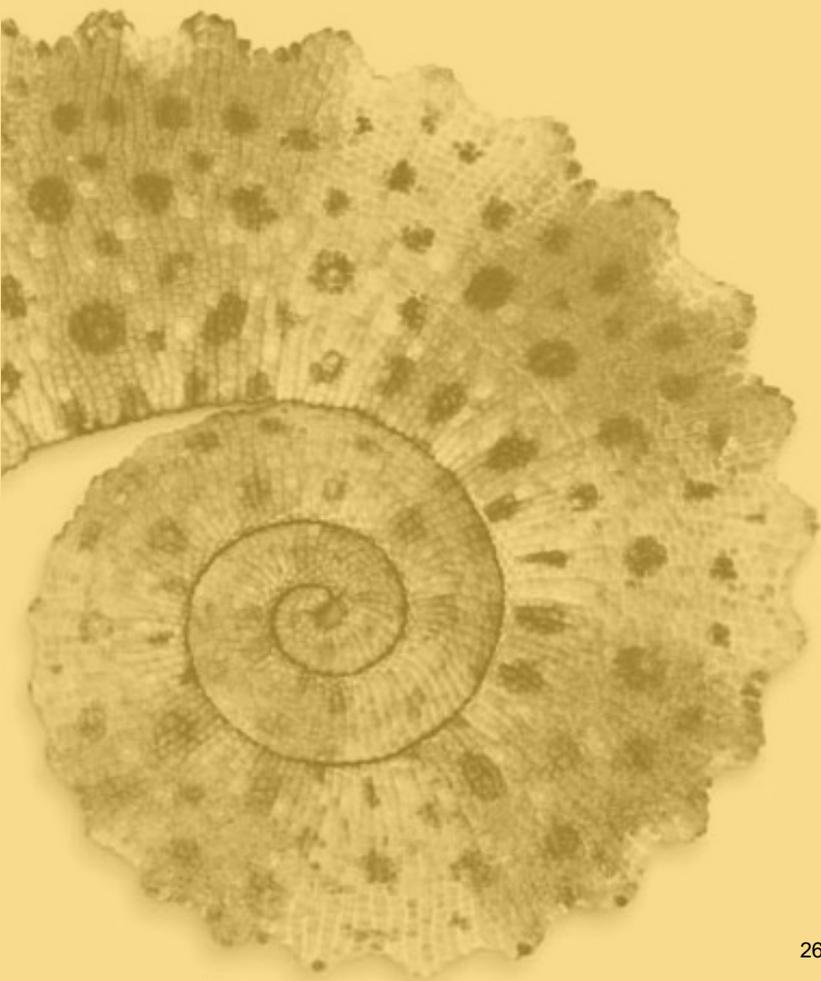
Think about how to frame the benefits of the project for each audience. Why will employees love the new way of doing business? What speaks clearly to executives? Tell them which project results will deliver for them, in their own terms.

*Bare Minimum Tip:* Share project progress at regular executive meetings and all-company events.

These steps are easy to remember if you put their first letters together: I C A R E. If you do, this is how you show it.

# Change Management

Don't Wait to Tell Your Team About Big Changes Ahead



## Change Management: Don't Wait to Tell Your Team About Big Changes Ahead

*By Emerson Consultant, Kelley Egre*



**“What if, and I know this sounds kooky,  
we communicated with the employees.”**

I became a change manager for one reason: I genuinely care about people and I want everyone to succeed. In today's highly competitive global marketplace, success isn't possible without a commitment to change. And, although we all know it's necessary, constant change is one of the biggest challenges businesses face.

Every change strikes fear in the hearts of employees. If you ignore that fear, you can end up with widespread dissatisfaction, lack of focus, and lagging business performance. Just what you don't need!

Despite those consequences leaders often choose to wait until they know every detail before announcing a big change to the organization. Understandable, but naïve – rumors spread quickly. Pretty soon, leadership has lost the chance to get ahead of the story.

In 20 years managing communications for large national and global brands, I've supported thousands of employees through transformative change. I've seen many initiatives up close. I can attest that clear, thoughtful and empathetic communication - early and often – builds trust and takes the momentum out of rumors and dissatisfaction.

Here are five tips for getting ahead of change and keeping your team on track, especially when don't have all the answers.

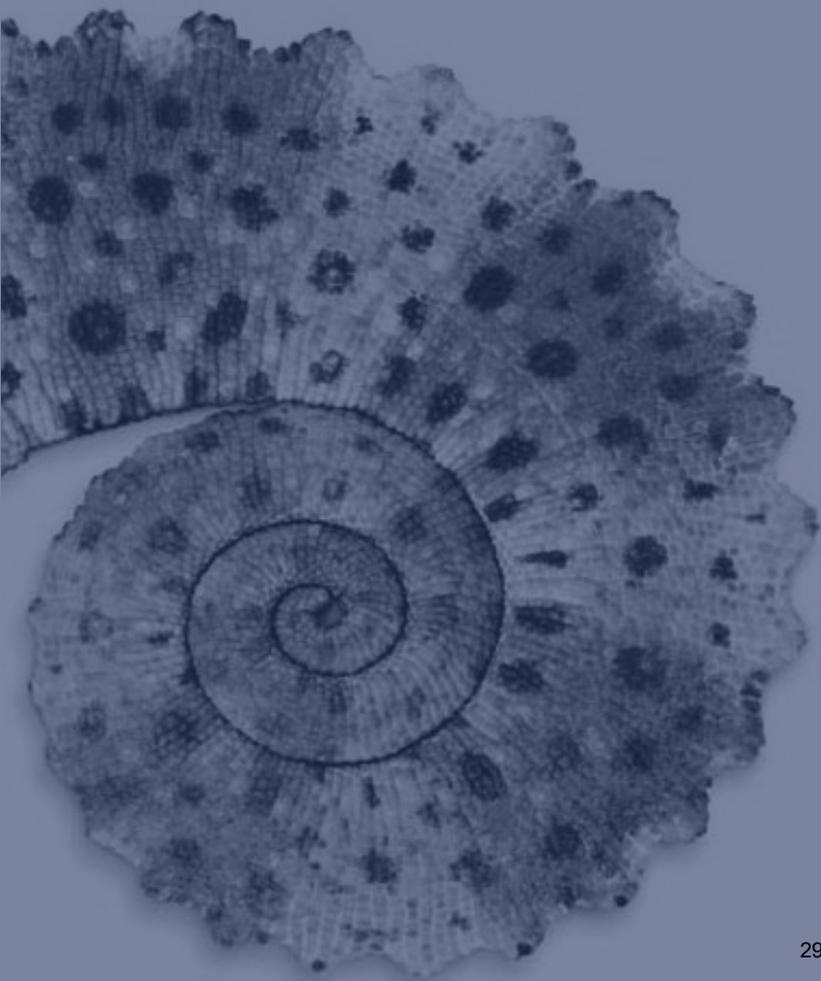
1. **Tailor all of your messages by audience.** And, don't just tell them what the change is. Tell them what's in it for them and what you will share with them next.
2. **Say it and address questions. Then say it again and again.** People need to hear the same message seven to ten times to really get it. And the more you can deliver those messages in person, the better.
3. **Use multiple messengers.** Make sure it's not always the same person talking. Information should come from leadership, first-line supervisors, peers, and third-party experts. Choose the messengers based on their influence and credibility.
4. **Share examples that motivate.** Human examples and real numbers are memorable and build positive momentum for your change.

*And, my most important tip of all...*

5. **Tell the truth.** Trust is critical to your success. Employees would rather hear "I don't know that answer yet" than to find out you lied. It's scary sometimes, but your honesty can help you come through the toughest change with a stronger organization.

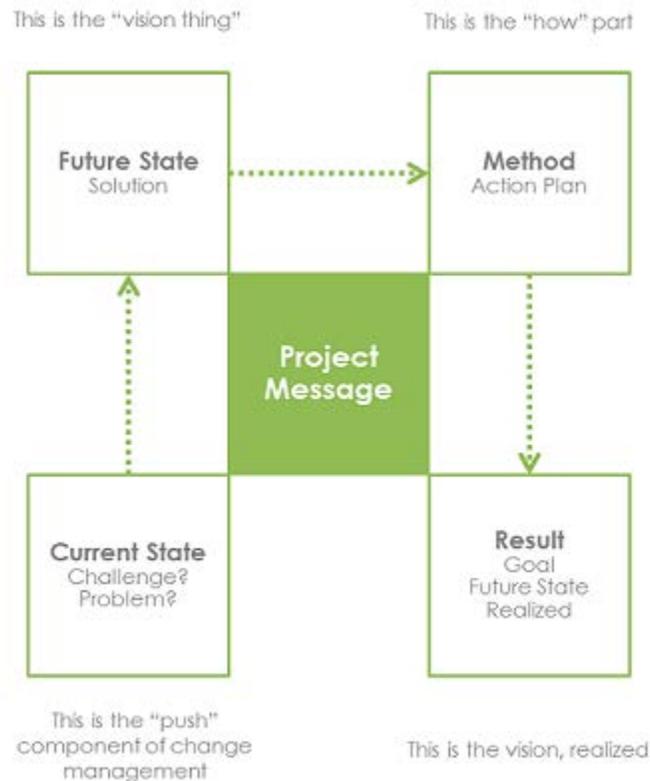
# Change Management

Master Your Message



# Change Management: Master Your Message

By Emerson Client Director, Lisa Westerfield



Organizational communication is deceptive. It seems simple – just writing or speaking to managers and employees. Yet it's often responsible for costly losses. Change in organizations – mergers, reorganization, process change, new IT solutions — is often a big investment. In a 2008 survey of 47 global companies, two of the top three reasons for unsuccessful change initiatives were a) not articulating a "burning need" for the change, and b) poor, untimely, unclear or inconsistent communications.

Why do so many communication efforts fall flat? Or, more importantly, why is YOUR communication ineffective?

We can't know until we examine you. Yes, we treat a communication problem like a doctor treats a patient. There are many things that need to go right, to be healthy. When it comes to communication, five things have to go right; you must understand your audience, leverage organizational culture, have the right message, deliver it the right way, and balance your "push" (pain) information with "pull" (aspirational) information.

But let's focus on some two common ailments: developing a poor message and delivering it badly.

## **The Right Message**

The best messages are short, simple and easy to remember. They are the 30-second elevator speech — the 30,000-foot view. They are the distillation of everything into simple, compelling, “message points” – single words, each supported by a few phrases, facts or quotes that reinforce that point.

Because most adults are visual learners, you’ll help people remember your message if you associate it with both words and pictures. Imagine drawing a box or a triangle. Now imagine each corner labeled with a major message point. Remember, message points are best if boiled down to one word. That simple visual helps those responsible for telling your story stay “onmessage.”

Successful messages invariably leave some good stuff on the cutting room floor. A message is not a treatise on everything an organization or project does. It is a tool to earn the attention of your target audience and to help align key messengers. When a busy executive meets a colleague in the hall, her ability to recall the three key words and associated facts (without relying on a PowerPoint deck!) increases the chances your audience will hear about the change in a consistent and sincere way.

Think of messages like pieces of meat used to distract the dog guarding the jewels. They are the best arguments you have to grab people’s attention, answer problems, refute weaknesses, highlight strengths – and steal the jewels – whether that is their support, their resources, their business, their financial assistance or their hearts and minds.

## **The Right Delivery**

There is nothing magic about delivering a message in the right way, yet it so often goes wrong. A few things can improve your chances of success.

First, use a personal touch. Tell real stories that support your message. It’s important to include comments and quotes from people who are a lot like your target audience. And, in addition to referencing others like them, use experts. Third-party validation of your change, by trusted sources, is really powerful. Remember, “Four out of five dentists recommend Trident for their patients who chew gum.”

Second: repeat, repeat, repeat. Re-use facts, stories, and information. Studies show the average person must hear, see or read a message seven times before really understanding it. Once you and your team are sick of your message — when it rings in your ears at breakfast like a bad jingle – know that your audience is just starting to hear it for the first time.

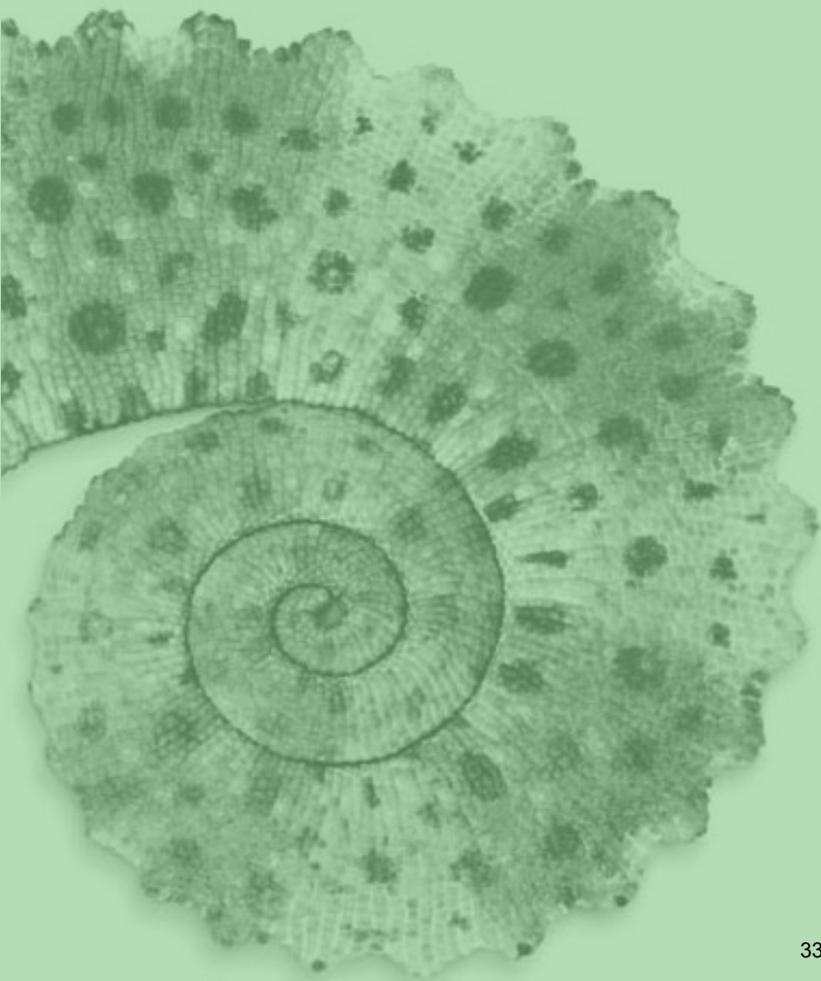
Third, maintain message discipline. Each presentation, every article, public remarks, emails, etc...must be on-message. Wandering off-message is easy because your product, project or organization is about much more than the message. But talking about those other things takes you off track. It distracts from the message you’ve been repeating, over and over, to create a shared direction.

## **Write the Story of Your Success**

Companies face many challenges when they approach change. But the right message, delivered in the right way, puts you ahead of the game. Following sound communication practices lets you tell your story – consistently, repeatedly — on your terms.

# Change Management

The Performance Dip Myth



# Change Management: The Performance Dip Myth

By Emerson CEO, Trish Emerson



The first myth: that there has to be a drop in performance after a change event. There doesn't. And there shouldn't. The fact that we expect one creates a self-fulfilling prophecy.

Remember the four-minute mile? It was assumed to be an absolute limitation of human performance until Roger Bannister broke it. He broke it because he did the hard work of preparation, and because he believed he could. And after he believed, other elite runners followed. Roger Bannister had taken the teeth out of 4:00.

Setting the expectation that there will be a drop in performance is giving your power away, just as those runners used to. It's creating a haven for sloppy change interventions. Drops in performance don't have to happen. They happen when we have not:

*Clearly defined the performance required after the event. In other words, we have not described the specific actions each person must perform differently on Monday morning. Mapped the before and after, from each individual's point of view. For example, where are the resources people used to depend on? What new resources are in their places? Let people practice the skills needed for these new actions. We haven't let them try, fail, use the new tools and resources, and find a way to succeed. Convinced our people that they need to perform these new actions – that the change is vital to the organization and there's nowhere to go but forward. Demonstrated success, so they won't be afraid to go "all in."*

Anything new here? Nope. But here's the issue: we have spent our days believing in the performance drop, and working to minimize it. What if our change planning made the drop unacceptable? What if the metrics we talk about, but never measure, included an immediate timeframe to adoption: start-to-success within three months?

These steps take significant effort and attention to detail. They require a pit bull's commitment. I suspect we're afraid to step up to the task. And we're afraid to demand the same of the sponsor whose neck is on the line for delivery.

We're afraid because we're looking down. We expect hard times, lower performance, and lots of confusion and adjustment after the change. So our sponsors and our people hesitate.

What if, instead of asking them to weather the dip, we ask them to move upward and only upward? What if we tell them that, after all that ground work (in the bullets above), we'll be stepping UP, not down? When an executive has gone to the board for a transformational change, make sure they know how to lead the team in this way. Their careers are in the balance. Give them the option to support you in doing the right work so your organization steps up — only up — to new levels of success.

# Learning and Development



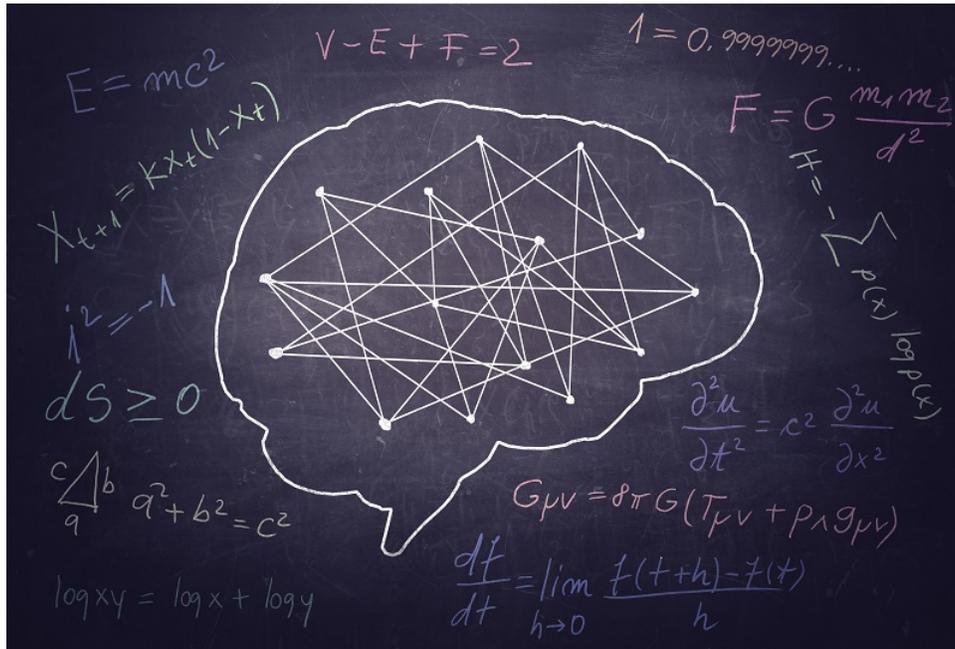
# Learning and Development

It's Not Rocket Science, It's Brain Science



# Learning and Development: It's not Rocket Science, It's Brain Science

By Emerson Director, Learning and Development, Freddy Mitchell



We've all read the research on the modern learner – make it more modular, gamify it, or make it mobile. But don't let these trends distract you. Here are a few common signs you need to re-focus on the basic elements of good learning and changing human behavior.

## 1. You deploy leadership training, but survey results show no one participated.

What are your learners comparing it to? What is their frame of reference for his content? Adult learners anchor what they are hearing or seeing to what they have seen or heard before. If you don't **anchor** it, they will! Try branding the program differently or compare it to an experience that has given them great skills or insights. Learners will connect your training to those anchors and begin to see the learning as more purposeful.

## 2. Your training falls flat and survey results show a negative learning experience.

How did the session start? How did it end? What highs and lows did you build into the session? Take a hard look at those and you might start to understand participants' feedback. Ever go on vacation and, when you tell a friend about it, all you can remember are the most spectacular sights or the travel disasters? Our brains are hard-wired to focus on the highs and lows, or **peak ends**, of any experience. Orchestrate those highs and lows. For example, begin with an engaging ice breaker (high), followed by a challenging discussion (low), and then an activity that gets people on their feet and talking to each other. Tip: Do

you want to ensure those evaluations come in more positive? End on a high note your learners will remember when they do their review.

### 3. **Your systems training is launched, but users report many issues as they try to use the system on the job.**

Research shows we feel the pain of loss much more acutely than the pleasure of gain. That's why we stay in jobs longer than we should or in relationships long after they've fizzled. It's called **Loss Aversion** and the loss of systems is no different. For some users, the old system was fine, and it was comforting and affirming to know exactly how to do the job well each day. For those users, the new system is painful; they don't know it all anymore. They don't know how to find information, complete daily tasks, or speed through those processes. They are grieving that feeling of safety and confidence. You can fix this by identifying the real pain points. What is the pain of not changing systems? What are the consequences of the aging or inadequate system – consequences learners might not be thinking of? If we don't change, information might be more and more outdated or irrelevant. Maybe competitors will take our share of the market or our customers will have a bad experience and leave. Find out what this change is really about and build that into training. Help your learners imagine the pain in not changing to a new system.

### 4. **Compliance training leaves your audience “glazed over.”**

Have you ever conducted training face-to-face and sense that your audience is less than thrilled? Sometimes the content itself is hard to make fun and exciting. But you can find ways to add some spice to your training. One way: give learners some **control**. Humans like predictability and influence on things that affect them. For example, if you were to become ill, you would want to help determine the treatment plan and understand your prognosis. Faced with uncertainty, we seek control. When you're designing training, (even compliance training!) look for ways to give learners control. For example, use advanced organizers so they can see the content at a glance. Let them describe their learning goals and track progress themselves. Give them electives to choose from. Or let them choose the order in which they take courses. Give as much control as possible and learners will engage and feel a sense of accomplishment.

### 5. **Learners are not up to date on the latest tax curriculum.**

You've built the course, your learners have taken it, but you're still seeing performance problems on the job. The text-heavy content might be your problem. Studies have shown our brains are triggered more easily by **visual images**; in fact, we can remember over 2,000 images with 90% accuracy, even after 90 days. That's huge! So, while some might say there are distinct learning styles or preferred learning methods, we know the brain loves visualization. Use that to increase retention. Make content more visual and your learners will recall more than they would by looking only at text-heavy slides.

## 6. Your accounting department is having a hard time learning the new business process.

Chances are, any new accounting process is complex and has many exceptions to the norm. That's a big hill for your learners to climb. Help them out by engineering success and building **momentum**. We all need small wins to keep ourselves going when the going gets tough. For example, when we diet, we like to see that our work is making a difference – the needle on the scale is inching downward. The day we stop seeing results, we become discouraged or demotivated. Learners are no different. They need to see that their effort is connected to results and progress toward the goal. Start with simple tasks that ensure small wins, then build in bigger achievements for more complex or challenging tasks. Momentum is movement that takes on a life of its own and escalates – soon your learners will be on a sure path to success on the job.

### **This Isn't Rocket Science, It's Brain Science**

All of these tips are founded in scientific research about human behavior and the brain. So, while learning trends and societal shifts won't stop, we know a few facts about the human behavior that transcend the trend. Use these techniques to really give your training the wow it needs!

# Learning and Development

PowerPoint Is Not Training



# Learning and Development: PowerPoint is Not Training

By Ryan Sumner



*"I can't wait to see your deck!" – said no one, ever.*

Real talk: chances are slim you'll hear oohs and awe during your PowerPoint presentation. Don't take it personally, take it as failing of the business world. Microsoft estimates more than 30 million PowerPoint decks are presented every day. That's a lot of slides. We're decked to death.

Keep this in mind the next time you use PowerPoint. While it's an easy and well-accepted tool for the deck builder, it's not always so great for the learner.

Why? The way we use decks helps us as presenters and trainers more than it helps learners.

People have to quickly read and glean data from each slide, while you're talking, before you – poof! - move on and the slide disappears. Same for the next slide. And the next.

If you have a more active and familiar audience, you can expect requests to "go back a few slides" where you'll re-explain as they furiously take notes. You'll see a few furrowed brows, but eventually they will stop asking questions. That's not always a good thing.

If you have a distant or more formal audience, people will tune out and make a mental note to ask you for the deck later.

Most presenters offer to send it anyway. The presenter and audience have good intentions, but it's sort of a cop out. You're unintentionally saying, "I know you probably didn't learn what you needed, but it's all right here – good luck!"

Many of us in the audience don't look at those abandoned decks. If we do...now it's a job aid. You could have designed a job aid that works as a job aid instead.

Most people need both the deck and the presenter to facilitate learning. You probably won't be with learners when they are trying to execute what you have taught. So even if you have the most amazing deck ever, there are a few things you can do.

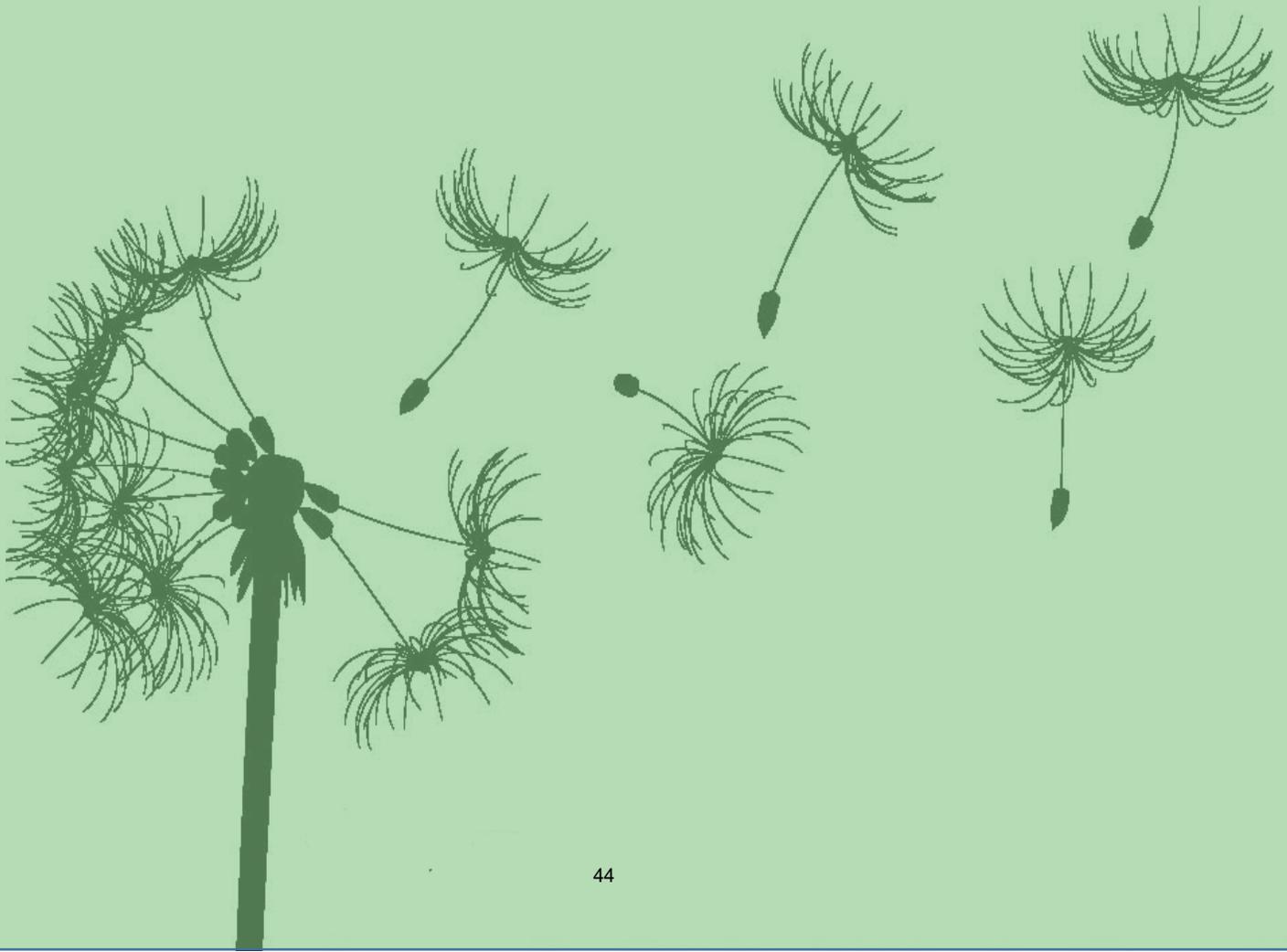
1. Even if it's not training – it's "just a presentation" – raise it to the level of a learning experience. Think like an instructional designer. People learn by engaging, but every slide is essentially a passive experience. Any kind of content can be turned into an interaction. So, stop. Leave the deck during your presentation to get your audience talking, doing and sharing.
2. Build in time for that engagement. If you have 30 minutes on the agenda, don't build 30 minutes of slides. Leave time for practice and discussion. And that doesn't just mean after your slides are done – make it clear you're ready to stay on one slide until everyone is comfortable, before moving on. Leaving no extra time says to the group, "My deck is perfect – this is all you need."
3. Think of even the simplest presentation as a multi-step learning process. The steps should include your presentation, follow-up, and on-the-job learning opportunities. So build tools that support each step.

PowerPoint is an incredibly successful and useful tool. But it's just one tool and it shouldn't drive the service you are providing to your audience. Put learning first and make the deck follow.

[Click here to watch a quick ehcTV video](#) explaining how to best leverage (but not lean on) PowerPoint.

# Learning and Development

If You Train Them, They Will Perform!



# Learning and Development: If You Train Them, They Will Perform!

*By Emerson Associate Director, Chris Harper*



Or will they? Perhaps you've just rolled out a new system. Or you've changed a core job process. Or maybe you've hired a new set of leaders. What do you do before letting your employees loose on the job? Train them! And yet for some reason, they don't always do what you want.

In 2016, companies around the world spent \$359.3 billion in training their employees according to TrainingIndustry.com ([source](#)). Within North America, companies spend \$161.7 billion. Outside the misspent dollars and time, when behaviors don't change, there are other implications.

- Your company doesn't realize the benefits of a change.
- Leaders point fingers and want answers about what went wrong.
- Managers become frustrated because they're not getting the outcomes they're accountable for.
- Employees lose productivity, confidence, and might suffer real impacts to their rewards and careers.

As a learning professional, I certainly don't want these outcomes for my clients. While there's no guarantee of on-the-job performance, there are five things you can do to improve your chances. Think of this plan as your **CREST** for success!

1. **Commit.** When your company is making a change, get your senior leaders on board from the outset. Have them define what success looks like. Ask them to model the changes they want to see. When they champion the behaviors, employees are more likely to adopt them.
2. **Reward.** When you see it, reward it. As employees start to adopt new behaviors, reinforce their actions. Make it public and immediate. Don't wait until the next staff meeting to call out a victory. Send an email to the team describing the success and the positive outcome. Forward positive messages from customers to the team. Show that you know what success looks like, you see it, and that you care about it.
3. **Embed.** So often, learning is a one-time event. Right before the change happens, you train employees and expect them to remember it all. But there is always a lag between when employees learn new behaviors and when they need to perform. So embed the learning into the job. Train and support new skills and behaviors as they come up naturally, in real life.
4. **Support.** Performance support, like online help and job aids, is another way to move learning closer to on-the-job performance. And remember your walking, talking performance support: super-users or peer experts should be available when employees need them.
5. **Test.** After completing a training program, assess employees to make sure they can demonstrate the skills and behaviors your organization needs. Make the tests objective and performance-based.

Apply **CREST** to your learning program and you'll likely see more of the employee performance you want.

# Learning and Development

The Pen Is Mightier Than the Keyboard



# Learning and Development: The Pen Is Mightier Than the Keyboard

By Emerson Chief Operating Officer, Cathy Quon



You might have heard that, all around the country, elementary schools are dropping cursive writing and replacing it with computer time. Sounds about right for the digital age, huh?

But doing things the old-fashioned way has its advantages. I can't claim to be a proponent of cursive writing – I can't even make out my own signature — but what about print writing? Researchers are proving that writing things on paper is good for us.

In a recent study published in *Psychological Science*, Pam A. Mueller (Princeton) and Daniel M. Oppenheimer (UCLA) showed that students taking notes longhand benefited from better retention. They were testing an “encoding hypothesis:” longhand note-taking is “generative” and requires “summarizing, paraphrasing, and concept-mapping” whereas “non-generative” note-taking (i.e., typing on a laptop) is simply recording, verbatim.

In other words, the student tapping away on her keyboard is listening for words, not meaning. This hurts retention; Mueller and Oppenheimer found that the more students listened for the verbatim, the worse they did when they tried to recall what they had learned.

Let's take this idea from the classroom to the workplace.

I still do a lot of note-taking on my laptop, but I'm starting to change my ways. I have been inspired by author Austin Kleon. In his *New York Times* best-seller *Steal like an Artist*, he has a chapter called "Step Away from the Screen." He quotes his favorite cartoonist, Lynda Barry: "In this digital age, don't forget to use your digits!" Yep, she means those things at the end of your arms.

Austin uses two desks in his office: one for "analog" and one for "digital." His swivel chair sits between the two desks. He starts in analog, with paper and a variety of writing instruments like pens and markers. After he gets his ideas down in analog form, he spins to his digital desk and edits his work on his laptop and big monitor. He uses a continuous loop: hands, computer, hands, computer...until he's satisfied with the result.

I don't have a set-up like Austin, but I've developed habits that work for me. I start my PowerPoint presentations with a pen. I like to fold an 8.5 x 11 sheet of paper in eighths — each square representing one slide. Then I write directly in each square. Or, to kick my creativity up a notch, I jot down notes on small post-its and move them around on the sheet of paper until I'm satisfied with the flow. I'm "using my digits" and encoding the information, which helps me remember the arc and details of my presentation. And I can actually see the narrative unfolding on this single sheet of paper...something I can't get in PowerPoint.

Austin also says the computer brings out the uptight perfectionist in each of us, because we start to edit ideas before we've allowed them to mature. There's something confining about that single digital screen or slide, whereas a whole pile of scratch paper can be doodled on with abandon – ideas are quickly and easily kept or trashed.

So, do you want to remember what you learn? Be more creative? Occasionally, swap your laptop for your trusty pen and paper and see what you get. I dare you.

Sources: NPR Weekend Edition: April 17, 2017: *Attention Students: Put Your Laptops Away*. *Steal like an Artist* by Austin Kleon, 2012.

# Learning and Development

Training Doesn't Have to Be Boring



# Learning and Development: Training Doesn't Have to Be Boring

*By Emerson Consulting Manager, Greg Bunn*



Recently, when I picked up my high school junior from school, I asked her how her classes were. "Boring," she said.

I develop learning programs for my clients, and I never want my learners say anything like that.

Usually, if our training participants aren't stimulated, it's because we are focused more on content delivery – unconsciously thinking of our learners as passive receptacles to be filled with content.

Instead, we need to focus on engaging them. It's easy to be bored when you're sitting, with little to do – it's hard to be bored when you're taking center-stage as the star of the show.

So, I'd like to provide four tips for stimulating learner engagement:

## **Stimulate their brains.**

Lectures are boring because they trigger only one part of the brain – the part that listens. To make your learning more impactful, try to engage as many brain systems as you can. Engage the visual cortex by surrounding the learning environment with pictures and graphics. We process images much more quickly and effectively than words, and we remember those images longer - especially if they are unique and grab our attention. By appealing to multiple brain centers, we give learners multiple paths to store and retrieve the information.

### **Stimulate their hearts.**

People learn more when they have an emotional connection to the topic. And the best way to build emotional connection is by sharing a story. Stories bring training to life. They give us a main character that learners can relate to. We care - we root for the character through the obstacles and challenges that give the story drama and build our interest. We are drawn into the story and want to know what happens next. We cheer when the hero of the story finds a way to overcome those difficulties – and we learn a little something about how we could do the same when facing a similar challenge.

### **Stimulate their hands and feet.**

Get learners out of their chairs and get their hearts pumping faster. Make the learners interact with and manipulate the content. Have them demonstrate content points. For example, if there are five key customer service principles you want them to remember, assign each principle to a small group and have that group come up with a dance move that represents the principle. Then have each group teach the others their dance move and pull it all together into the whole group doing the “customer service dance.” They might find it a bit silly, but they won’t be bored. And that will be one topic they remember for a long time!

### **Stimulate their funny bones.**

Laughter is the opposite of boredom. So make the learning fun. Use [gamification](#) to inspire some friendly competition between groups. For example, ask learners to share their funniest story from when things went wrong – you might even have them act it out as a skit or record it on video. Then, challenge the group to come up with their cleverest way to use the learning concepts to address the situation.

When learning programs activate participants’ brains, hearts, hands, feet, and funny bones, the last thing you’ll ever hear is “that was boring.”

# Technology Change



# Technology Change

Behaving Badly



## Technology Change: Behaving Badly

### Five Ways to Transform Employees from Cybersecurity Liabilities to Cybersafety Assets

By Emerson CEO, Trish Emerson



If you think technology is the answer to your organization's cybersecurity threats, consider the following:

- Sending phishing emails to just 10 employees gets hackers inside corporate gates 90 percent of the time, according to Verizon Communications' 2015 Data Breach Investigations Report. For the last two years, more than 2/3 of cyber-espionage incidents have featured phishing wherein attackers establish themselves on user devices and infiltrate the network.
- In the first half of 2015, malicious attachments became the go-to method for hackers to gain access, and a new stream of phishing attacks targeting businesses also began, according to a threat report from Proofpoint.
- The percentage of cyber-attacks targeted toward employees jumped from four percent in 2007 to 20 percent in 2010, according to a KPMG study. More recent research estimates that 40 percent of cyber-breaches could have been avoided had employees been aware of the risks and taken appropriate actions.

“The best technology on the market won’t help you if the bad guys get to your people,” says Mark Stone, CIO of the Texas A&M University System. Danny Miller, Texas A&M University System’s CISO, echoes that. “Even if you have the latest and best technology installed, one misstep by a user can throw it all out of the window.”

As more attacks are directed toward employees, many organizations are unprepared to react. They are also surprised by how difficult it is to change behaviors of the people on the front lines. Here are five ways to transform your people from cybersecurity liabilities to cybersafety assets.

#### 1. Realize it’s a change problem.

Behavioral change is tough, and we cannot achieve a marked and long-lasting change with traditional communication, standard training, or mild promises of a better future. One reason is that these blanket approaches promote a diffusion of responsibility – people don’t think the problem lies with them. Think of sexual harassment and inclusiveness training; people attend courses because they must, but they think the training is targeted at someone else.

One chief security information officer confided that his biggest issue is that each department believes its own people are fine, and the risk truly sits with “the knuckleheads in other departments.” His question: how do we get people to understand that cyber risk is not a reflection on the integrity of the team; it is an individual mindset of vigilance to identify constant, undefined risk?

We can use behavioral science to help us. For example, research shows that we stay in a system until it no longer works for us personally. Economists and behavioral scientists Daniel Kahneman and Amos Tversky found that we feel the pain of loss more acutely than the pleasure of gain. So we unconsciously take greater risks and make bigger changes when confronted with painful situations. It’s why we stay in expired relationships and mind-numbing jobs. Until the pain is too great, we do nothing.

So how do we get people to feel enough “pain” to change? How do we get our colleagues, employees, and affiliates to understand that every one of us is a weak link and our current behavior is dangerous?

“Scaring people is a tactic that I certainly use to get their attention,” says Chris Walter, CIO of Central Garden & Pet. “Getting permission from employees who have been targeted and then using those real examples... That really resonates.” Some companies use internal phishing exercises. Through real-life stories and simulations, the employee understands viscerally that it can happen to him or her.

Jeff Dalton, Information Security Officer for the Bank of Marin recommends making it personal. “You wouldn’t want your personal information out on the web, would you? Be prudent when you surf the web or click on something. Relate the experience to that individual level.” Mr. Walter says he helps leadership feel the urgency in a number of ways. “I tell the executives that the network we have is just as much a corporate asset as your plant. Imagine if your plant were hit by a tornado.”

## 2. Link it to culture.

Culture is made up of the unspoken rules by which decisions get made. MIT professor Dr. Edgar Schein says that, when a group of people engage in a behavior and are successful, they repeat it. That constant repetition becomes culture. We might also think of culture as a collection of organizational habits. It's a powerful force, perpetuated by the brand of the company. People choose to work for Google or Coke because something about that brand resonates for them, personally. And it's tenacious; changing a culture is like changing the course of a river – it requires dynamite. It's easier not to swim upstream, but to harness the power of that culture to change behaviors. We must link new behaviors we want to what the culture already supports.

Behruz Nassre, VP Technical Operations, Security & Compliance for TubeMogul, an advertising software company, directly links their security efforts to their culture. "There are two to three things that are important here. First, we train people that if they say they are going to do something, they do it. Second, we do things fast and do not reprimand failure. We send that message with our internal hacking attempts. If you fail, it's OK so long as we learn from it and move on." He also links their security efforts to the coding sprints their developers already do. "We encourage our programmers to look at security output as a reflection of quality rather than risk. In the same way there's a bug and a fix; security bugs through static code or vulnerability are a quality feature to address."

## 3. Make it familiar, controlled, and successful.

**Familiar:** We evaluate all new situations by comparing them to what we already know or experienced. If something is familiar and we judge it as safe, we are more likely to do it. As we try to change risky cyber behavior, consider what our constituents might compare this effort to, and create links that make sense to them. For example, in a health environment, caregivers vigilantly wash hands. Asking people to pause before clicking is the electronic equivalent.

When Patrick Wilson, Chief Information Security Officer and Associate Director of Clinical Applications at Contra Costa Health California implemented a mandated password format change, he said, "One metaphor I used was comparing the complexity of an eight-character password to walking across the Golden Gate Bridge. Changing it to 12 characters is like walking from the Golden Gate to the Statue of Liberty – it's that much more difficult to breach."

**Controlled.** In a chaotic world, we seek structure and predictability. We can handle devastating news, even a cancer diagnosis, if we know what to expect and have specific actions to manage our situation. We must design cyber programs with this in mind. In many ways, it's like planning a typical IT deployment but for the employee's experience, so you and they know what to expect and feel in control.

In the case of cyber risk, this starts with clearly defining the behaviors we need from our employees – what we want them to do (behavior), when they should do it (trigger) and the confirmation that it worked (reinforcement). And we must schedule these activities so they layer systematically, establishing new habits.

A program conditioning people to recognize undefined, potential hazard might look like this:

- Month 1: Recognize cyber risk generated by others.
- Month 2: Recognize the cyber risks I create.
- Month 3: Recognize risks inherent in my environment.

Each week would focus on one simple behavior, with the associated trigger and acknowledgement. Like so:

- Month 1: Recognize cyber risk generated by others.
  - Week 1: Pause before clicking attachments.
  - Week 2: Pause before opening external email.
  - Week 3: Call IT if suspicious.
  - Week 4: Tell the requestor you'll call them back.

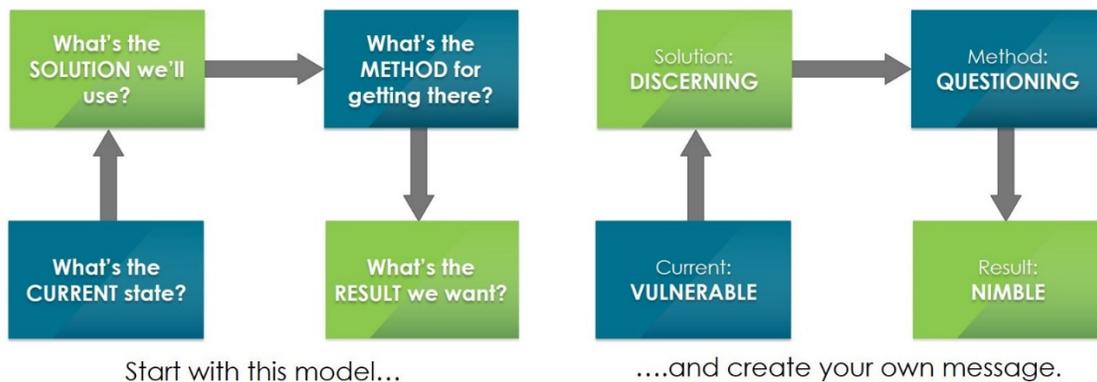
Successful: Finally, people adopt new behaviors if they believe they will be successful. In the research, it's described as "outcome primacy" — our first experience has a "substantial and lasting effect on subsequent behavior." (Journal of Experimental Psychology: General 142 (2): 476–488. [doi:10.1037/a0029550](https://doi.org/10.1037/a0029550)). For example, if someone starts a diet and loses weight in the first week, he or she will continue the diet. We must engineer success for users, as they practice and start to use the right cyber behaviors – make sure they understand when they have done it right, then repeat that experience over and over so that the behavior is naturally reinforced.

4. Don't communicate; focus attention.

Many organizations create extensive communication programs, but each wave communication is competing for individuals' attention. We filter out "noise," and pay attention to what is clear and relevant to us. Our challenge then is to focus attention so that our information about safe cyber behavior gets through our people's selective filters. One of the most effective ways is to get the organization "on-message" about the program, much like a political campaign. If team members can describe the effort passionately, without a PowerPoint, using their own examples, we win.

Think of the message as a square anchored by four words: one for the current situation, one for the solution, one for the method of getting there, and one for the result. For example, these words might be:

- Current: Vulnerable – Our current way of working is broken and we are at risk.
- Solution: Discerning — Employees should easily decide what’s nefarious.
- Method: Questioning – Employees should think about whether each action is risky.
- Results: Nimble – Our organization responds quickly and appropriately to relentless threats.



It’s imperative that key people agree on those words; the debate will help internalize them. The square shape helps too - visualization makes it memorable. Examples supporting the words must come from the team working on the message. And, as long as words remain constant, the team will be able to describe what they’re doing consistently in every conversation from the coffee shop to the boardroom.

Mr. Dalton underscores this: “Having them all in the same room and talking about it the same way - consistency of messaging. They have to lead by example so when I have senior staff and board room discussions, the message is always the same; they have the same frame of reference.”

#### 5. Measure and benchmark behaviors.

It always comes down to accountability, both at the organizational and individual levels. Mr. Nassre uses a variety of tactics. “We put out a monthly security report to our execs that includes a product and IT perspective, and a physical security perspective. These are the number of machines hit by viruses, how they were hacked, these were the campaigns we ran, these are total number of people who clicked that shouldn’t have, these are the number of bad passwords we found. We’re looking at trends.

Mr. Wilson's approach is similar. "We discuss the number of infections, number of inquiries regarding investigations, the number of computers needing to be rebuilt due to malware." He added, "We do a lot of our own assessments internally. There's a physical audit where we go to a new site each month and act as normal patients and talk with the local onsite management to discuss what they did extremely well and what they didn't. Many organizations forget about the physical site."

There are traditional benchmark sources like (ISC)2, SANS Institute and Brian Krebs. But, as Mr. Wilson observed, many organizations are overlooked by the larger benchmarking firms, and take inspiration from peer groups. "We meet with other facilities of the same size and revenue range."

The importance of the right cybersecurity behaviors cannot be overstated. And pulling the right behavioral levers will make all the difference to your company's security.

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# Technology Change

Strengthen Your First Line of Cyber Defense



# Technology Change: Strengthen Your First Line of Cyber Defense

*By Emerson Marketing Developer, Samantha Herscher*



When I first heard about WannaCry and Petya, I thought they were Reddit usernames. Unfortunately for thousands of Microsoft OS users, WannaCry and Petya are not so harmless - they are the names of two major ransomware attacks that hit systems across the globe.

Petya halted companies like DLA Piper and Oreo's producer Mondelēz International by making it impossible for employees to access their computers. To make a long story short, computers using Microsoft had a vulnerability called EternalBlue. Microsoft released a fix for the liability in March 2017, but any users who didn't accept that update were vulnerable. In other words, if you didn't press "Install" when the antivirus box appeared on your screen, your computer was at risk.

Like [our CEO Trish Emerson says](#), the first step to cybersecurity is realizing your business isn't facing a technology problem — it's a behavior problem. Petya did so much damage only because of an action users decided not to take. Get your employees to change their behavior (like installing security updates), and you've strengthened your first line of defense against cyber threats.

[We created a quick and easy video series about turning your employees into cybersecurity warriors.](#) Take the first step to safety by learning how to change behavior.

# Technology Change

Don't Just Budget for Tech; Budget for Transformation



# Technology Change: Don't Just Budget for Tech; Budget for Transformation

*By Emerson Vice President of Consulting, Christian Hasenoehrl*



“Can our software do that?”

Successful companies are constantly disrupted as they chase the benefits of new technologies. Today, the three main areas of business technology change are the move to the Cloud, Big Data and Data Security. Companies trying to stay up to speed on each of the three have to manage a lot of change at once. An organization might have hundreds of concurrent initiatives to upgrade systems, analyze big data, or maintain infrastructure. Over 90% of the Fortune 500 are now in the process of moving some or all of their technology infrastructure to the Cloud; they are working primarily with Microsoft's Azure, Amazon Web Services, or the Google Goog Platform.

Based on current data, we can forecast with certainty that the move to the Cloud will dominate technology organizations and drive the demand for talent for the next decade. Many industries are putting in place new best-in-class solutions based on infrastructure-as-a-service and Cloud-based applications.

How then must an organization plan for such a disruptive change? What is the scope of budgets facing approval by senior management? What will it take to implement a whole new way of doing business using The Cloud?

The best organizations are thoughtful about technology transformation. Many perform a comprehensive study of potential solutions and chose the right technology vendor. They build a comprehensive budget based on the costs provided by the vendor for the technology.

Yet many don't adequately budget for behavioral change, which drives most of the business case. How will your people perform with the new technology? Will roles and interactions change? What are the as-is and to-be processes? What are concurrent initiatives that might draw employees' attention away from the transformation and impede success? Being thoughtful about technology means considering these as essentials.

A successful major technology transformation must include a strategy and budget for helping people manage the transition and perform during and after the change. Job roles and processes will change for most employees. To get the full benefits of the technology, every employee must adopt new behaviors, work within new processes, and respond to new team and organizational goals.

So how much should you budget to engineer the employee experience (otherwise known as change management)? There are several ways to estimate the investment. We don't recommend anchoring it to the IT investment – one has little to do with the other, particularly as the cost of technology drops every year. But you can anchor it to the business case benefits: what percentage of the business case depends on your employees behaving differently? Or you can pick a reasonable amount to spend per employee, based on your particular technology and the degree of behavior change required.

The investment in employee performance is easy to justify. Around 60% of the business case for any technology change is driven by changes in behavior, while only 5% is driven by workforce optimization. Synergies, financial benefits and cost savings make up the rest.

For example, if the business case is \$100 million, up to \$60 million of the benefit will come from employees becoming more effective and efficient in their new roles, leading to increased sales and profitability. The budget to design the Employee Experience should be set in relation to the overall business case. Some of the most successful companies spend up to 10% of their business benefit on designing the Employee Experience. The success of the business case is driven not only by an investment in new technology, but by a purposeful investment in people and their performance.

For more on technology change budgeting, [read this chapter from The Technology Change Book.](#)

# Technology Change

Five Questions Every CEO Should Ask When  
Implementing ERP



# Technology Change: Five Questions Every CEO Should Ask When Implementing ERP

By Emerson CEO, Trish Emerson



A global retailer once hired me to help install PeopleSoft — it was their 3rd attempt. Their pain is not uncommon. ERP is a vital management tool, but implementation is a nightmare.

The average cost of an ERP implementation is \$4.5 million or 6% of revenue (Panorama). The average time to implement is 1-3 years. The WSJ described SAP implementation as a corporate root canal.

Here are five questions you need to ask, and answer.

## 1. Who is on the team?

The most common mistake is to assign responsibility to IT and whichever department will use the system most. Those two silos typically don't appreciate the implications of their decisions on the groups who will input, maintain or receive outputs from the system. This can scuttle your ERP. Instead, get a cross-section of expertise on your team. Every group interacting with the system should be there. And the team should be made of your best employees. Their decisions will impact how this system (and your business) will run for years.

## 2. What one behavior drives the business case?

If your team is serious about the business case, they must articulate what they need people to do in clear, tactical terms. Then focus, focus, focus; focus relentlessly on that. An IT firm spent millions on ERP to help them make money on license renewals. The one activity they needed most from their sales team was to call clients the month before their contracts expired. Because they didn't make that specific request, sales people didn't do it consistently. The firm could not hit the business case; it was wholly based on "license renewals" — a lovely concept that no one acted upon.

### 3. How are we managing first impressions of the system?

Shteingart, Neiman & Lowenstein's 2013 research, published in the Journal of Experimental Psychology, shows that "first experience has a disproportionately large effect on subsequent actions," something they labeled "outcome primacy." In other words, first impressions matter. So the first employees who touch the system — starting with requirements definition — had better be wowed. Only someone in marketing should be giving the project a name. And if user acceptance testing sucks, stop implementation. As Kahneman and Tversky found, we feel the pain of loss more acutely than the pleasure of gain. We compulsively avoid anything that smacks of failure. Manage the employee experience as rigorously as you manage the project itself.

### 4. Who will be our first users?

In the 1960s, Everett Rogers published a book called the Diffusion of Innovations, which analyzed why certain ideas and products capture the public's imagination. He mapped those who adopt the idea against a bell curve, showing that 3.5% of the target group are eager early adopters, and 13.5% are positively predisposed to change. You can use this to create momentum. If you want your ERP to look like a winner, find the early adopters. Enlist the 3.5% for system test, and the 13.5% for UAT. Pilot with these employees intentionally. They'll make the system seem safe and successful to everyone else.

### 5. How are we ensuring the system is employee-centric?

Employees don't think about the system. They think about their jobs. Training must be about how to use the system in the context of their jobs. What will they do, day to day? Where will new tasks and handoffs take place? Where are the data and tools they relied upon – which will stay and which will be replaced? Generic ERP training is a waste of time and money. Train people to do their jobs, not use a system.

ERP is one of the most invasive and expensive undertakings your company will face – even if it's "cloud based" and "intuitive." If you get these five things right, you're ahead of the game and on your way to return on your investment.

# Technology Change

Go Live Like a Pro



# Technology Change: Go Live Like a Pro

*By Emerson Consulting Manager, John Graves*



Application migration is a fact of life for businesses today. Companies commonly move application programs from one environment to another. Smart leaders include stakeholders in their migration plans.

Keeping stakeholders informed as the migration draws near is critical to the success of the project. Ideally, strong communication means everyone affected will be working to support the move. This helps the business avoid disruption and meet its objectives.

One way to prepare stakeholders for migration Go-Live is to deliver “T-Minus” communications. Here’s the approach I’ve used:

**T-180** – Six months before the Go-Live, send an email to impacted stakeholders that the migration is coming. Give them the basics: the reasons, the timing and information on how to prepare.

**T-60** – Two months before the migration, send another email to those affected, letting them know the migration is getting closer. Repeat the information you sent before, and emphasize preparation and help from the migration team. Most important are the migration window, IT team contact information, and any other ways to ask for support.

**T-30** – One month before the migration, send a similar email. Continue to ask for questions and concerns.

**T-21, T-14 & T-7** – Three weeks, two weeks and one week prior to the migration Go-Live, email again. Use any questions you have received from users to anticipate the information people might need; you can proactively answer questions for the larger group.

**T-1** – One day before the migration, send final instructions to users. Remind them of the migration window and contact information.

**T-1 Hour** – On the day of the migration, send an email asking stakeholders to shut down any systems or applications involved in the move.

**T-0** – Once migration is underway, email users to let them know the process kicked off as scheduled. This will also help you catch anyone who didn't comply with the shutdown request.

**T+ Migration Updates** – During the migration, send emails to impacted stakeholders based on migration milestones. These messages assure stakeholders that the migration is proceeding as planned – it gives them confidence in the team and the process.

**T+ Go-Live Complete Announcement** – Once the migration is complete, send a notice to inform stakeholders that the migration was successful and the application is ready to be used again.

There are many ways to share information for a migration. This is an approach I've used successfully. How have you approached this type of work?

# Technology Change

Ready, Fire, Aim or Ready, Aim, Fire?



# Technology Change: Ready, Fire, Aim or Ready, Aim, Fire?

By Emerson Consultant, Brian D'Angelo



We love our new tech toys, don't we? They bring us hope and happiness because each new piece of tech means that our lives and businesses are getting better and better...easier and easier.

The Cloud, cybersecurity, the entire Internet of THINGS...the potential is enough to make anybody and any company giddy.

But the problem doesn't lie in the potential, it lies in the execution.

There are [dozens of studies showing that many technology projects fail](#). And Forbes recently wrote that [54 percent of IT project failures can be attributed to poor management](#), while only 3 percent are due to technological problems. We at Emerson tend to agree. This fits what we hear when our clients talk about their tech implementations: they often fail to prepare the business for the change, sometimes because they rush implementation to achieve the promises of the technology. It's what I like to call "The Ready, Fire, Aim Syndrome."

## The Syndrome Is Real

For example, leaders might get excited to launch Tech A because they want to get more products to market faster, with a deeper connection to the consumer. Or they launch Tech B because the entire Creative Department will be 17.08% more productive during their shortened work weeks. Faster is better right? Faster implementation, more benefit.

But without a well-defined strategy, they doom their project to a number of expensive problems that affect the company's bottom line. And that's not all – company morale after even one failed initiative can be devastating, impacting both project engagement and employee productivity. Leadership often launches, then surveys the damage, then works hard to walk the change back or solve the problems the launch created. Ready, Fire, Aim.

The solution is fundamental change management. In other words: Ready, Aim, Fire.

## **Ready**

Start by understanding the business outcome you want. Often, companies implement technology without confirming that it will actually solve their problem...or that they have a problem to solve in the first place. Once you are sure the chosen technology will improve your business, study the impacts: who it will affect, how the change will impact those groups, and how it will affect the company as a whole.

Decide who will spearhead and sponsor the process and then get all your organization's leaders rallying around one message to deliver to the organization and external stakeholders. Choose someone to build a robust communication plan that delivers custom communications to the different stakeholders in the change. Pick a team to build and deploy communications, training and conversion performance support, and ongoing support.

Having these people and plans in place sets you on the right path to maximum benefits and minimum loss of time, money and morale.

## **Aim**

Now, implement your change management strategy, including the following:

- Get leaders aligned to help message the change.
- Engage early adopters to promote the change.
- Orchestrate stakeholders' experiences with the new technology and focus their attention on the behaviors you want.
- Educate and train employees on exactly which behaviors to stop, start, and continue.
- Get IT and training teams ready to support performers.

As you execute these plans, you will build organizational momentum for the change.

## **Fire**

If you have done all of the above, you are ready to launch. But don't take your eye off the goal. Ongoing communication and support is critical to support users and stakeholders and make sure you're getting the business performance and benefits you want.

Having a plan to avoid the Ready, Fire, Aim syndrome doesn't mean you'll avoid all the pitfalls of new tech launches. It means you'll have a much better chance of success. And you'll be ready to manage and recover from pitfalls quickly and nimbly, saving the company downtime and lost revenue.

Chances are, you won't be in the unfortunate majority: tech projects that fail. Your change management will pay off in a win for your organization.