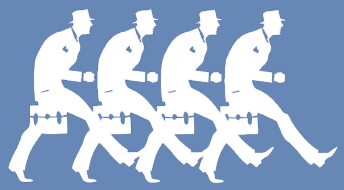
The Emerson Blog

Volume 3

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



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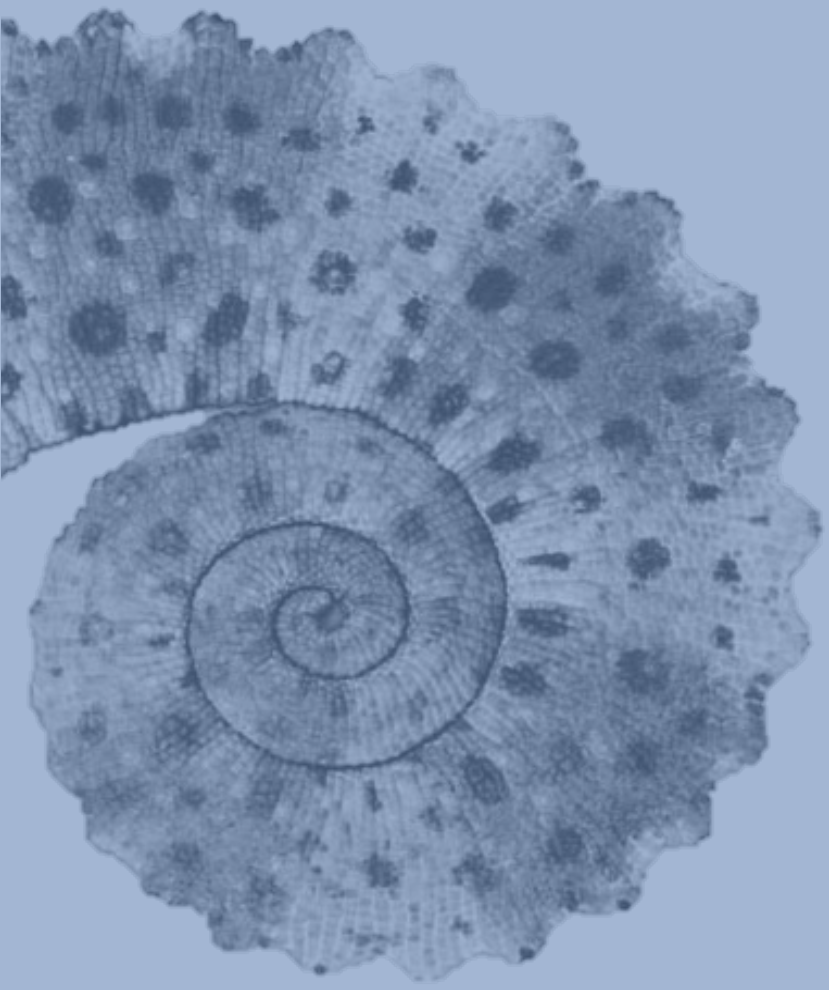


The Four Elements of a Powerful Message

By Emerson Chief of Staff, 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?

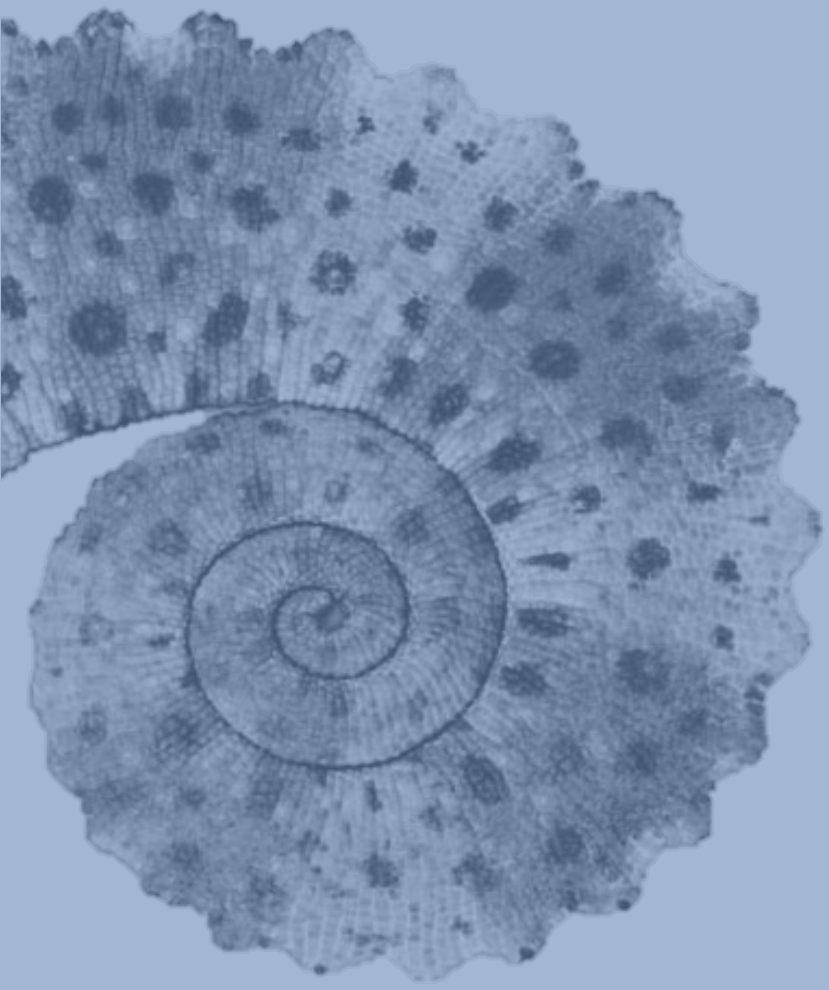
Them: Now I see why there are so many people working on the project.

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.

Change Management

How to Handle Resistance to Change



How to Handle Resistance to Change

By Emerson Consultant, Jonna Howe

You've probably watched a heckler interrupt a public speaker. Maybe you've watched – on video or in person – as a performer or politician has to deal with mocking or derisive comments, shouted from the crowd. Maybe the speaker answers back, or security escorts the heckler from the venue.

Change initiatives can have hecklers too. They usually don't shout down a speaker; they use other ways to criticize and disrupt.

It's to be expected. People are resistant to change. Hecklers might say negative things about your project or predict it will fail. They might even try to sabotage project activities or influence others to join in their negative campaign. You might secretly wish you had security to escort those hecklers from the building! But that's not going to happen.

So how do you confront hecklers? You don't.

Here's what you do. Instead of seeking out and addressing every critic of your project, focus your energy where it counts. Figure out who has the ability to influence the success of the project. Are some of those influencers mildly resistant or mildly supportive of the change? Those people are your sweet spot. They matter, because they can affect the project. And they're not so strongly against your project that they're beyond persuasion. Your sweet spot is that group of hecklers that you could actually turn into advocates, with a little effort.

But how do you bring them over from the dark side? Communication and involvement are your tools.

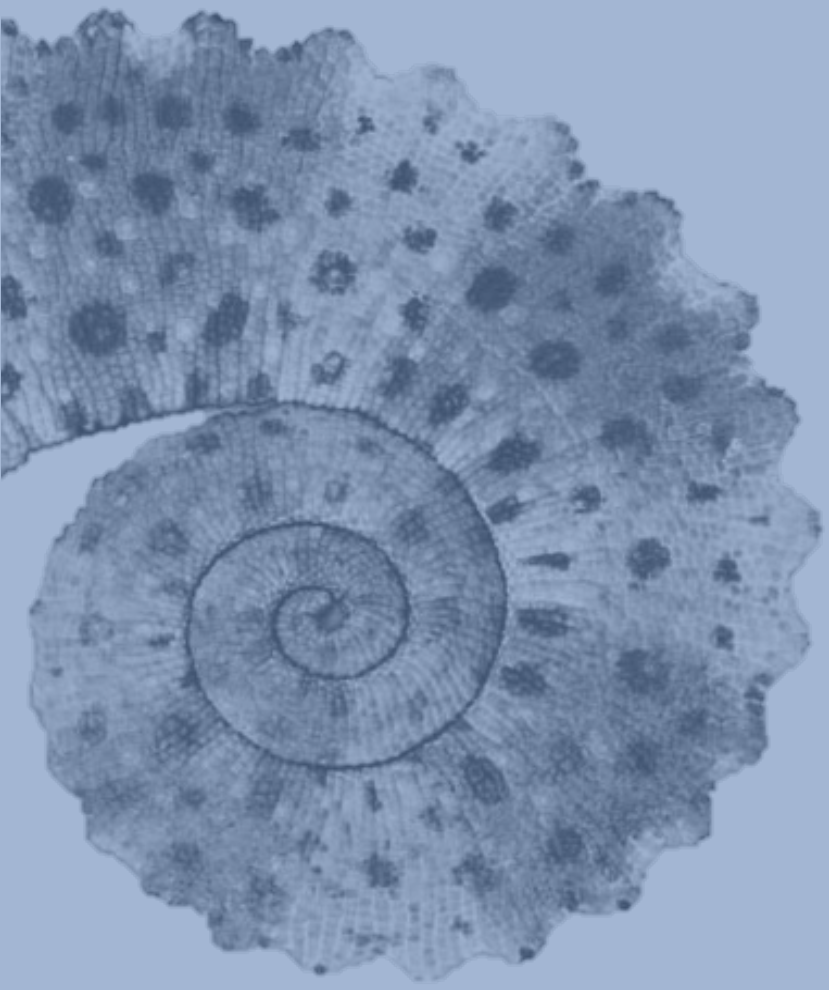
Communication. Ask: What do they care about? What are the benefits of the change to them? What negative consequences will they feel if the project fails? What do they need to hear to make this change seem like a good idea?

Involvement. Ask: How can we help them own the change? Where can we leverage their expertise? What has resonated with them in the past to spur them to action? Based on that, what how can they participate? Focus groups? Governance? Serving as subject matter experts?

So don't confront all of your hecklers. Instead, focus on those in your sweet spot. Continue to communicate, engage, train, and support them as you execute your change management plan. As the project bandwagon grows, the fans will drown out the hecklers.

Change Management

Three Factors to Consider in Cross-Cultural Change Projects



Three Factors to Consider in Cross-Cultural Change Projects

By Emerson Vice President, Mark Bashrum

Change is hard for all of us, no matter where we sit in the world. However, when a change project spans multiple geographies and cultures, we must adapt our approach. Too often, global organizations disregard cultural nuances and fail to understand that the perception of change, organizational or otherwise, is not consistent across the world. They gloss over cultural norms and value systems and the initiative suffers.

Here are a few cultural factors that might impact your change projects and some recommendations on adjusting your approach.

Sharing Authority

Cultures share power differently. Some place all authority and decision-making at the top of the organization, while others distribute the power more evenly.

For example, I was working with an executive of a state-owned enterprise in China. They were launching a new ERP system to almost a million employees. We were discussing the best project management and governance approach. The executive said, "I don't need any of that. I just tell people what to do and they do it."

As it turns out, that wasn't just the view of the executive, it was the view of the entire organization. Nothing got done unless and until he said it got done. This didn't mean that workers had no point of view or that they didn't want to be consulted. It only meant that no action would be taken unless it came from the top.

Think about how this might impact the way we engage employees during a change project. In this instance, top-down is everything, so we might consider videos or other communications featuring executives. Regional alignment is still needed, but it's less important than in cultures where authority is distributed more evenly.

Aversion to Risk

We all are risk-averse. After all, who likes uncertainty? It's really the trade-off between risk and reward that matters.

Some cultures are more entrepreneurial by nature and are more willing to take risks if they believe the benefits will follow. That same spirit permeates the workplace; employees are more willing to change if they buy into the benefits. Messaging benefits is always important, but more so within risk-tolerant cultures.

In cultures where employees are less willing to give up certainty for future benefits, you might take a different tack. Here it's important to create a new certainty – to make the point that the current state is not sustainable and that future stability relies on the change. Additionally, these cultures want to see more structure around the change. It must be highly engineered and deliver proof of a new order.

Collective Mindset

A few years back I was working on a project in the Philippines with a local businesswoman. She had a very successful consulting company and wanted help with her sales processes. After digging in, I was surprised to find out how many of her engagements were collaborations with her direct competitors. Not partnerships, but true collaborations where resources were traded back and forth and co-managed for the benefit of the client. Neither firm took advantage of the other, nor did they undermine the other's position in the engagement. It was amazing to watch.

Cultures with a collective mindset value the contributions of the group over the individual. The opposite is true of individualistic cultures; in these cultures, a team-based recognition and reward structure might actually be demotivating and create conflict and distrust. It is critical to understand the collective vs. individualist mindset during the change process, particularly when we think about alignment and messaging.

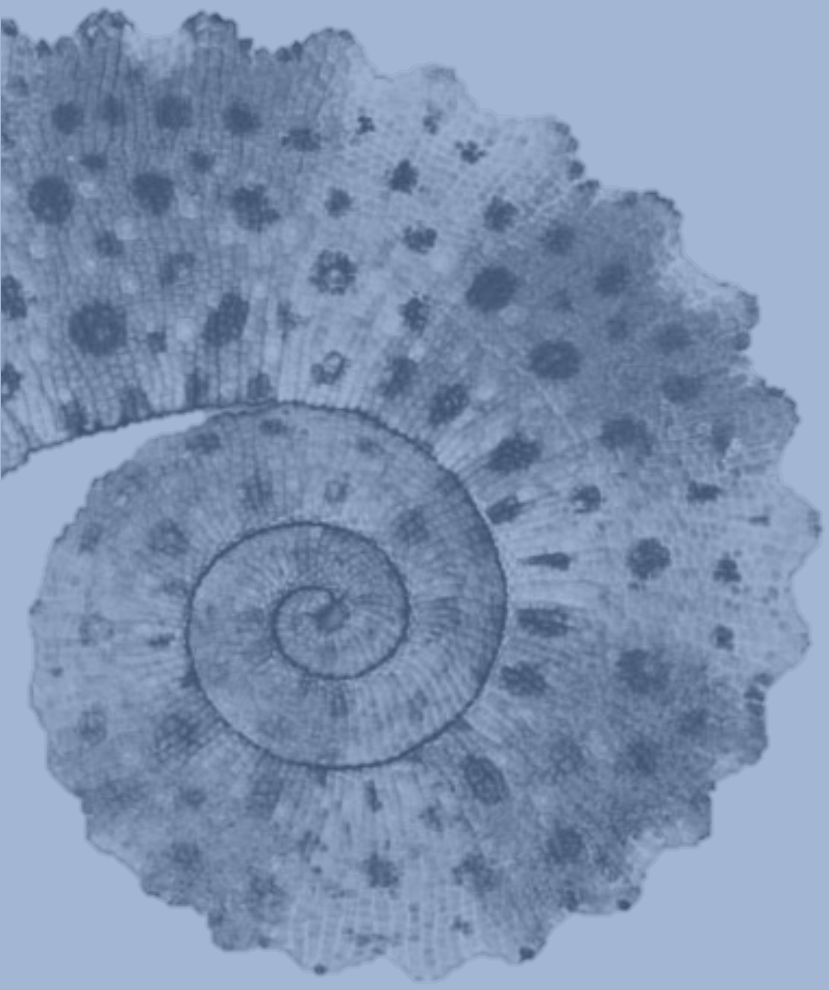
In the United States, we have a more individualist approach and build our change interactions accordingly. We don't tend to spend a lot of time and effort positioning the change's value to the firm and to society in general. It's about the WIIFM, and making sure individuals view the change as a positive step for themselves and their careers. In Sweden, however, this approach might feel unsettling or even shallow.

It's important to understand what motivates people to change and those motivations might be completely different in a multi-culture change initiative.

Our culture impacts the way we view change and consequently how we should approach change management in multi-cultural implementations. In the end, change management is about changing behaviors. If we believe that behavior follows thought, then we first need to understand how cultural norms and values influence the way the organization thinks. In multi-cultural change initiatives, our interactions should motivate and support each culture according to its own set of values.

Change Management

Three Things You Need Before You Trust Your People



Three Things You Need Before You Trust Your People

By Emerson CEO, Trish Emerson

When my client – let's call him John – hired a new president to run his company he expected his stress level to go down. He thought he'd be free to focus on strategic issues and long-range planWhen my client – let's call him John – hired a new president to run his company he expected his stress level to go down. He thought he'd be free to focus on strategic issues and long-range planning. He was wrong.ning. He was wrong.

Within a few months, the president – I'll call him Paul – started holding meetings without including John. Paul unraveled John's decision to move their customer service center to a new location. He invested in new products without considering the complexity and the impact on the rest of the business. He couldn't provide data or detail to support his decisions. The rest of the executive team worked long hours to prepare for key meetings; Paul left at 5:00. This new guy didn't reduce John's stress – he was the source of it.

When John confronted Paul with these issues, Paul told him to "Get out of the detail," and, "Trust me." Paul understood correctly that John did not trust him. And, following this conversation, John trusted him even less.

How much do you trust the people who report to you? Does trusting them mean not getting into the details of their work? How do you balance trust and effective management?

Robert Solomon and Fernando Flores write in their book Building Trust: In Business, Politics, Relationships, and Life that "…the key to trust is action, and, in particular, commitment: commitments made and commitments honored." So how do you create a pattern of honored commitments with your team?

Before you trust, ask for these commitments.

There are three commitments that create trust, and one of them is *not* to demonstrate psychic powers. People can't deliver on something that's stored securely in your head. You must articulate the commitments you want. Tell your direct reports that is up to them to:

Manage expectations. You expect a certain level of performance from the people who report to you. However, it is their responsibility to manage your expectations. They should tell you what to expect regarding their results, their timing, and their teams. They should keep you up to speed on the fundamentals of their work: what, where, when, how, why, how often, and to what extent.

Keep promises. Executive coach Chalmers Brothers describes conversations as a series of promises that are essential to building trust. If you tell me you will meet me for coffee today at 3:00 and don't show, that moment will inform what I think of you. A person's word is a promise -- a reflection of stewardship and character. You must be able to count on your people to do what they say.

Eliminate surprises. Establish a zero-tolerance policy for surprises. The minute somebody on your team knows they are taking a new strategy, they'll miss a deadline, that there's problem with quality, someone is quitting…they have an obligation to inform you. You cannot manage without crucial information. You must never be caught off-guard by the very people who should help you be an effective leader.

When they fail, have this conversation.

Nobody's perfect. Inevitably, even your most reliable team member will do something that challenges your trust. Where do you go from there? That depends on what happened.

Solomon and Flores tell us, "Breaches of trust do not mark the end of trust but are part of the process of trusting. (There are many kinds of breaches, from mistakes to betrayal and treachery. It is important not to confuse them or assume that all breaches are betrayals.)" How will you know which one it is? You have to talk it out.

A productive conversation requires preparation. Steve Giondomenica, CEO of technology strategy firm CMI, recommends you get a pen and paper. Here's his process:

Before the meeting

Identify the headline. Distill the problem into one sentence. Don't worry about others reading it – write down the essential issue. For example, John's headline might have been, "I am out of the loop" or "You and I are making conflicting decisions." This exercise forces you to be direct. It will create clarity and prevent misunderstandings.

Define the ideal outcome. What do you hope will happen as a result of this conversation? John's ideal outcome might be "We discuss each major decision before you make it." You are applying the Covey principle: "Begin with the end in mind."

List examples and the impact they had. Most of us know we should be prepared with examples, but Steve emphasizes the impact. Both elements -- the example and the impact -- are essential so that the person you speak to understands why the issue matters. For example, John's decision not to move the call center cost the company money and made people wonder who was in charge.

I asked Steve, "What if you don't have an example? What if you just sense that something is off?" In these situations, Steve advises that you set up the conversation by saying, "I don't have enough data, but this caught my attention."

During the meeting

It's at this point Steve advises you to draw on the power of your relationship. "Ideally, you create a win-win situation, to build the relationship and strengthen mutual trust. When I assume the best of you, the conversation changes entirely." To this, he uses the following process:

Confirm good will. This matters most for difficult conversations. In these situations, Steve will ask if the other person believes he has their best interest at heart. "If they answer with an authentic, 'yes,' I know they can hear this conversation as constructive rather than threatening. If they hesitate, I then focus on where our trust is broken. This creates a foundation for the rest of the conversation."

Frame the conversation. Admit that the conversation is not easy, but that you're committed to a positive outcome. Steve emphasizes his commitment to strengthening the relationship moving forward. Steve often brings the notes he prepared to the meeting. When the conversation is difficult, he'll say, "This is a tough conversation, and I want to get it right. This is why I brought notes."

Ask, "Were you aware you did this, and was this your intent?" There are two points to this question: awareness and intent. It's possible the issue was inadvertent. This question allows the person to share their experience, and to address your perception.

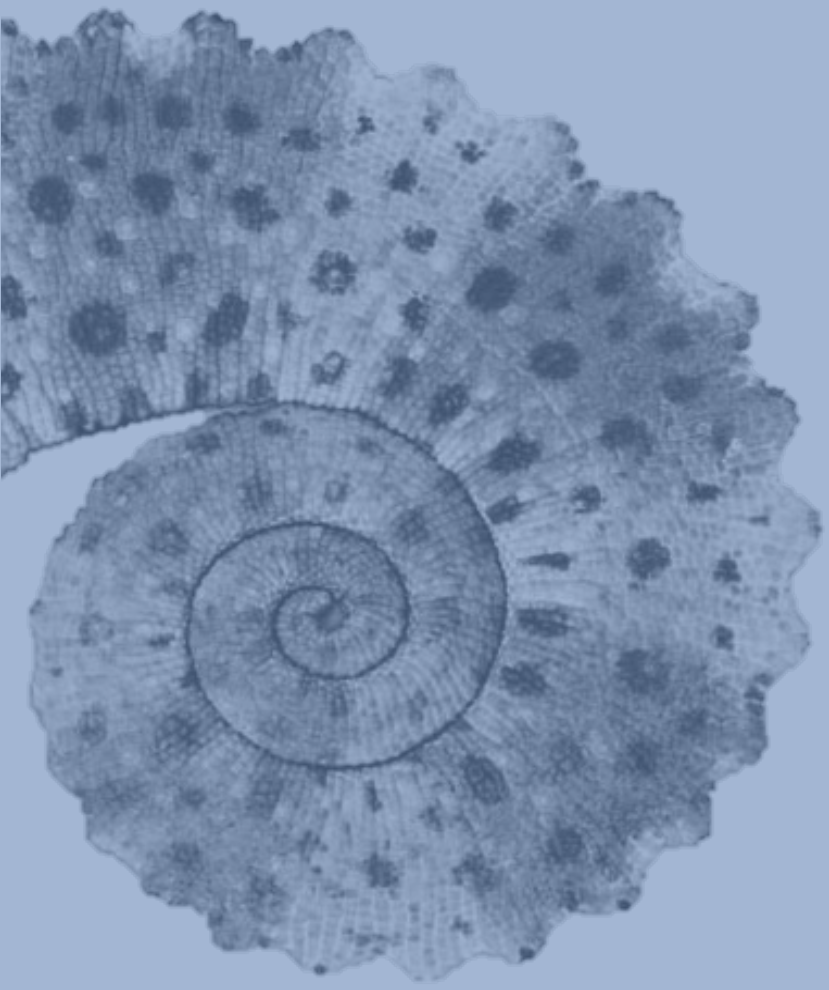
Conclude with agreements. Steve believes this is the most important part of your conversation because it creates commitment to action. He often follows up with a thank you note that summarizes the mutual agreements from the conversation. According to Steve, "This is incredibly powerful. If the person doesn't honor the commitment, you can move straight to the agreement. You can say, 'Hey, didn't we agree to X?' instead of dredging up the whole conversation."

Trust is based on commitments made and commitments honored. When you create clarity about what those commitments are, and your people deliver what you expect, you become more comfortable letting go of the detail. You've effectively balanced trust and accountability.

Click here to download a tool to help you conduct your own trust-building conversations.

Change Management

Maintain Your Organization's Work Style During Big Change



Maintain Your Organizaton's Work Style During Change

By Emerson Client Director, Tony Papirio

Work style is how things get done. It's the day-to-day manifestation of your organization's culture -- the unspoken way we work and deliver projects. It's framed by purpose and guided by values.

During times of intense change, it's important to be aware of your organization's work style, and to honor it. Transformation projects are stressful enough to knock even the strongest of us off-course. The best way to help your organization is to stay true to what works for you.

There are three key areas of focus.

Communication. How much communication does your organization need? What kinds of communication work for you? The channels might be formal, informal or a combination. Every organization is different. For example, if your teams are highly focused on running an operation, or they are spread out geographically, you might need dedicated, in-person events like town halls to reach them. Who are credible messengers to spread the word, -- managers or respected peers? It's critical to know what it takes to get employees to focus their attention.

Consensus Requirements. Does your organization run on consensus? The answer drives the speed of decision-making. Whose opinion matters? If all the key people need to buy in, build in time to gain that consensus. Identify which stakeholders have to bless each decision, follow a process, and make sure the teams know their voices have been heard. Depending on the topic, you might need less consensus. Take advantage of that – push work to the lowest-level teams that can make the decision.

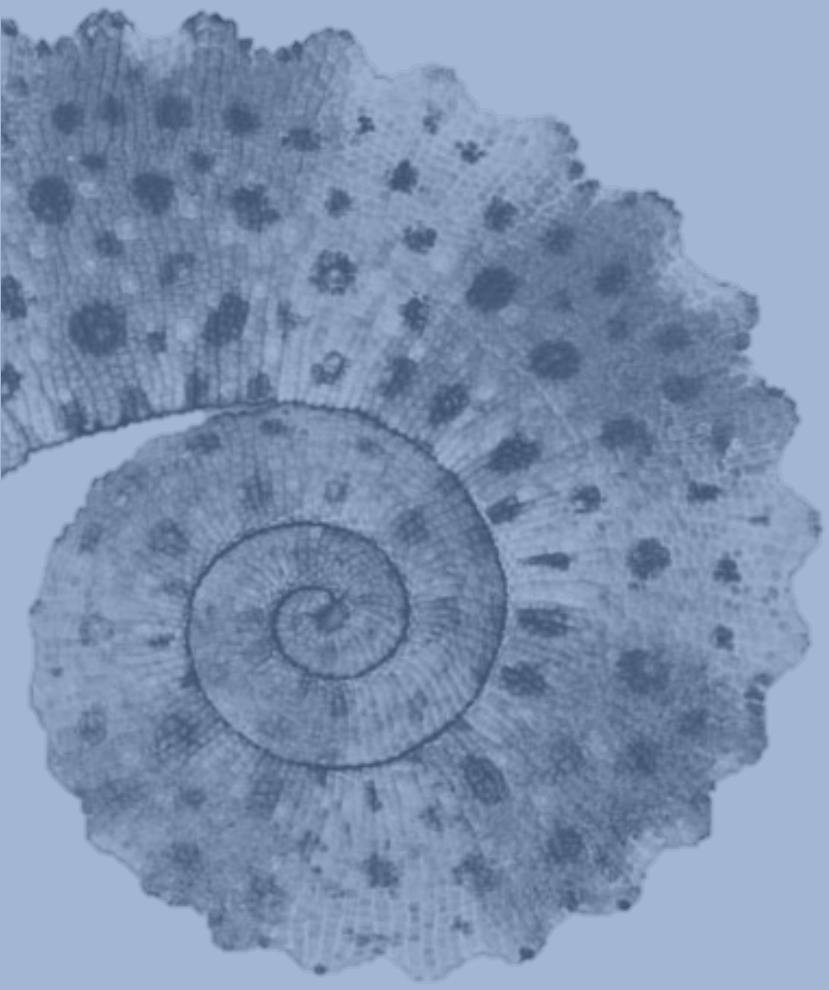
Relationships vs. Structure. To what extent does work get done through deep relationships vs. systems and process? If relationships are important, plan for that. Create a framework that fosters relationships. For example, create robust onboarding, recognition methods, and celebration rituals. Relationship-based cultures will resist too much structure if it's visible. If your teams are more systems-oriented, lean on those processes. But be careful – it's easy to ignore a well-oiled machine. Make sure you review processes -- at least annually -- to ensure they help employees to their best work. Identify and close any gaps.

Clarifying your organization's best working styles helps leadership strike the right balance between empowerment and accountability. And it makes any big transformation so much easier.

So, what's your style?

Change Management

How to Be a Facilitative Leader



How to Be a Facilitative Leader

By Emerson Consulting Manager, John Graves

We are all familiar with the typical autocratic leadership style -- the "my way or the highway" mentality. But it's not the only way to lead.

Well-known business author, Stephen Covey said, "Leadership is a choice, not a position." Covey is suggesting not only that leadership doesn't have to come from the top down, but that we can all act as leaders, regardless of our role or title. I'd like to suggest that each of us can become a facilitative leader

Four Tenets of Facilitative Leadership

Facilitative leadership is all about maximizing others' contributions. There are four behavior characteristics of a facilitative leader.

Actively listening and seeking to understand. This includes things like listening intently…asking questions…and paraphrasing what you heard.

Providing clarity and purpose. Facilitative leaders identify the problem that needs to be solved. They ask and seek answers to "Why are we doing this? Where are we trying to go? Do you know what you're trying to achieve? Does the team know the objective?"

Connecting the dots. This means making sense of all the pieces of the project or work effort, and connecting all the players (project team, sponsors, business stakeholders, change agents, etc.). How does one area impact another? What can one member do to support another's performance? What do different teams need to know about each other and their processes or goals? A facilitative leader stimulates creative thinking through brainstorming, communication, and other activities that connect the elements of a team or organization.

Influencing collaboration. This involves getting all the players to work together to solve a problem — encouraging group participation. Facilitative leaders manage contrasting perspectives and opinions to minimize conflict among members of a group. For example, they design inclusive group processes that honor individuals' different learning and participation styles, opening up the space for the more quiet individuals.

Can you be a facilitative leader – even though you're not the boss and have a specific team and role -- and still remain neutral and fair? Yes, you can.

- Asking clarifying questions doesn't put you on one side of the fence or the other.
- Bringing all the key players into the meeting doesn't make you biased.

Ensuring that all meeting participants have an opportunity to share their thoughts, does not mean you're leaning one way or another.

Neutrality does not mean inaction or passiveness. Neutral facilitative leadership can surface solutions that make the team stronger and help reach organizational goals.

Can you be a facilitative leader?

Many of you are already facilitators. If you're a project manager, business analyst, change lead, or process improvement specialist, you are a facilitator of change and action. Practicing the four tenets of a facilitative leader can move you from being "merely" a facilitator to being a respected facilitative leader.

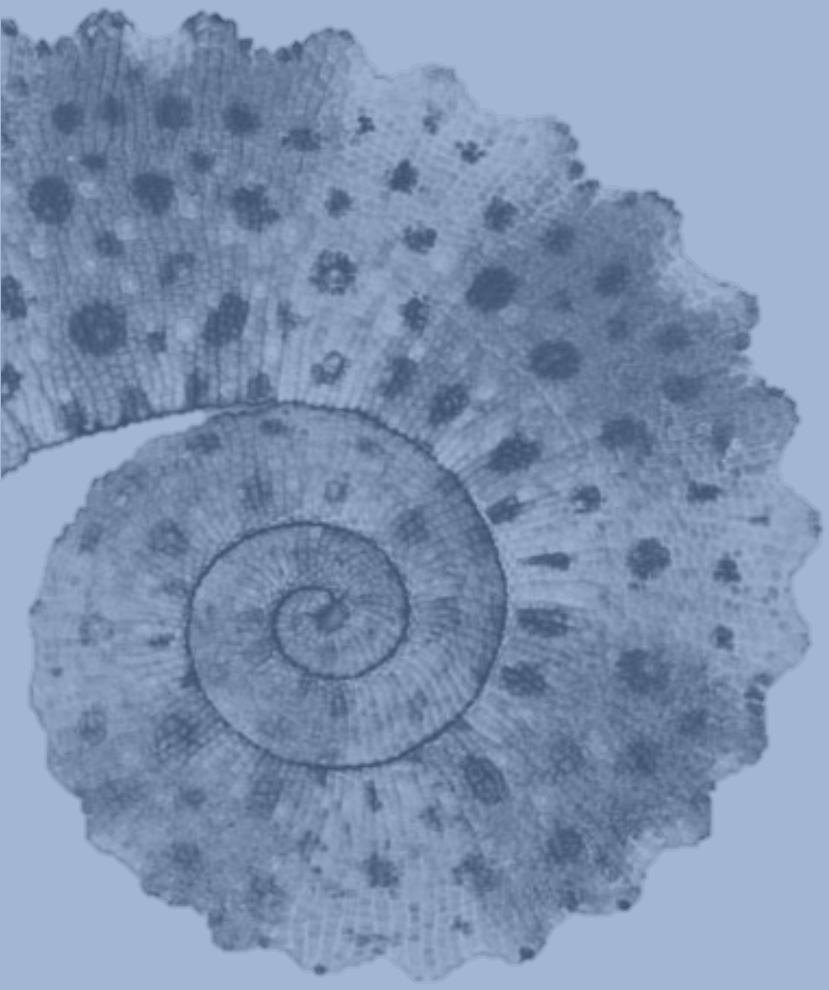
And it matters. Because facilitative leaders:

- Get everyone on the same page by applying an integrated lens.
- Draw from the strengths of all team members and impacted areas of the business.
- Gather divergent views and facts before deciding on a plan of action.
- Obtain greater commitment and buy-in from impacted stakeholders.
- Drive creativity, innovation, and brainstorming, resulting in better solutions.

Becoming a facilitative leader will make you more successful because the work you lead will be more successful. Give it a try!

Change Management

What You're Willing to Tolerate
Sets the Tone for Your Company Culture

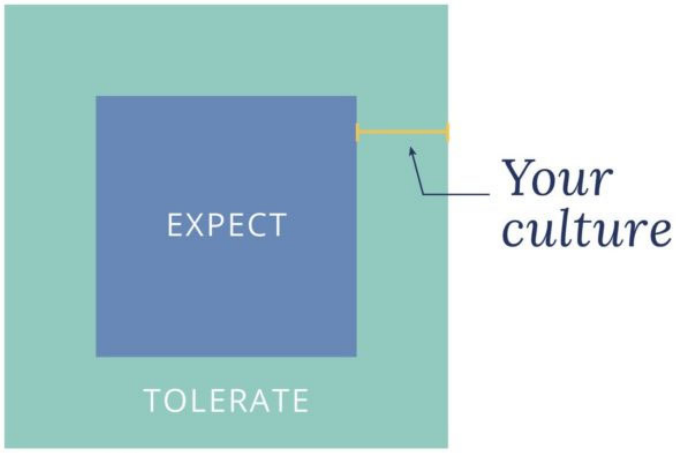


What You're Willing to Tolerate Sets the Tone for Your Company Culture

By Emerson CEO, Trish Emerson

I'm obsessing lately about a presentation Harvey Goldberg gave on leadership. He asked a simple question: "What do you expect from your people?" Then he asked, "Now, what do you tolerate from them?" He then drew the two squares above and said, "What you tolerate is what you will get, and that becomes your company culture."

Our job is to align what we tolerate and what we expect…to get to zero gap.



Source : Harvey Goldberg

Think about it.

Read down the columns. What kind of performance do you expect from an organization that exhibits the behavior on the left? How about the right?

And would people in your company be able to come up with the list on the left, on their own?

We expect our people to:	But we tolerate:
Be on time	Tardiness
Bring us solutions	Bringing us problems
Solve problems	Simply talking about them
Create value	Doing the job
Work as a team	Gossip and pettiness
Use the computer system	Excel spreadsheets and shadow systems
Put customer contacts in the customer relationship management system	Hoarding information
Prepare	Going on gut reactions and winging it
Be accountable	Excuses
Spend carefully	Excess
Follow processes	Exceptions
Follow through	Letting things slide

Why do we tolerate poor performance?

We are leaders responsible for running successful organizations. We are accustomed to giving direction and we are accountable for results. Yet that gap between what we tolerate and what we expect exists for all of us. There are some simple explanations.

We look away. Ever have that "how did we get here" moment? When I started my company, I didn't look closely at employee expense reports. People would take their colleagues out to lunch. Those lunches became weekly events at wonderful restaurants. They soon involved wine and no clients. Then one month-end, I found myself staring at $30,000 of internal employee restaurant expenses. A grain of sand is nearly invisible, but in bulk it becomes a beach.

We rationalize. Do you tell yourself things like, "I don't like admin; I'm not that person's parent; I should empower people; I believe people will naturally do the right thing?" Our internal dialogue is based on how we want to see ourselves and the world. That dialogue is storytelling; we often tell ourselves stories that let people off the hook. Look at your story. Is it enabling people to behave badly? How does the story you tell yourself serve you?

It's the path of least resistance. Accountability takes work and it takes vigilance. Letting things slide is easier – in the short term -- than holding people accountable. Creating clear guidelines, setting expectations, establishing measures, then following up is intellectual and emotional work. And it takes time. Letting your standards slide is easier.

We don't like confrontation. Everyone likes to be liked. And telling someone that they are not living up to our expectations means we risk a negative response – defensiveness, excuses, embarrassment, or rejection. We encounter what Dale Carnegie observed: "When dealing with people, remember you are not dealing with creatures of logic, but creatures of emotion." And many of us find that uncomfortable.

How do we get the culture we expect?

Identify essential behaviors. What do you expect of your people? Make a list like the one in the table above. Detailing what you expect will help you be clear when you give direction.

Prioritize and focus. You have a limited amount of time and capacity, so focus your energy on one behavior at a time. Map the behaviors on a grid – low to high impact, vs. low to high difficulty. What is high-impact and easy to do? Start with those behaviors to establish a foundation, and then build on it.

Hold people accountable for one behavior per quarter. Research by Phillippa Lally and her team shows that it takes 66 days on average to ingrain a habit, but since business tends to run in quarterly cycles, a three-month cadence is just fine.

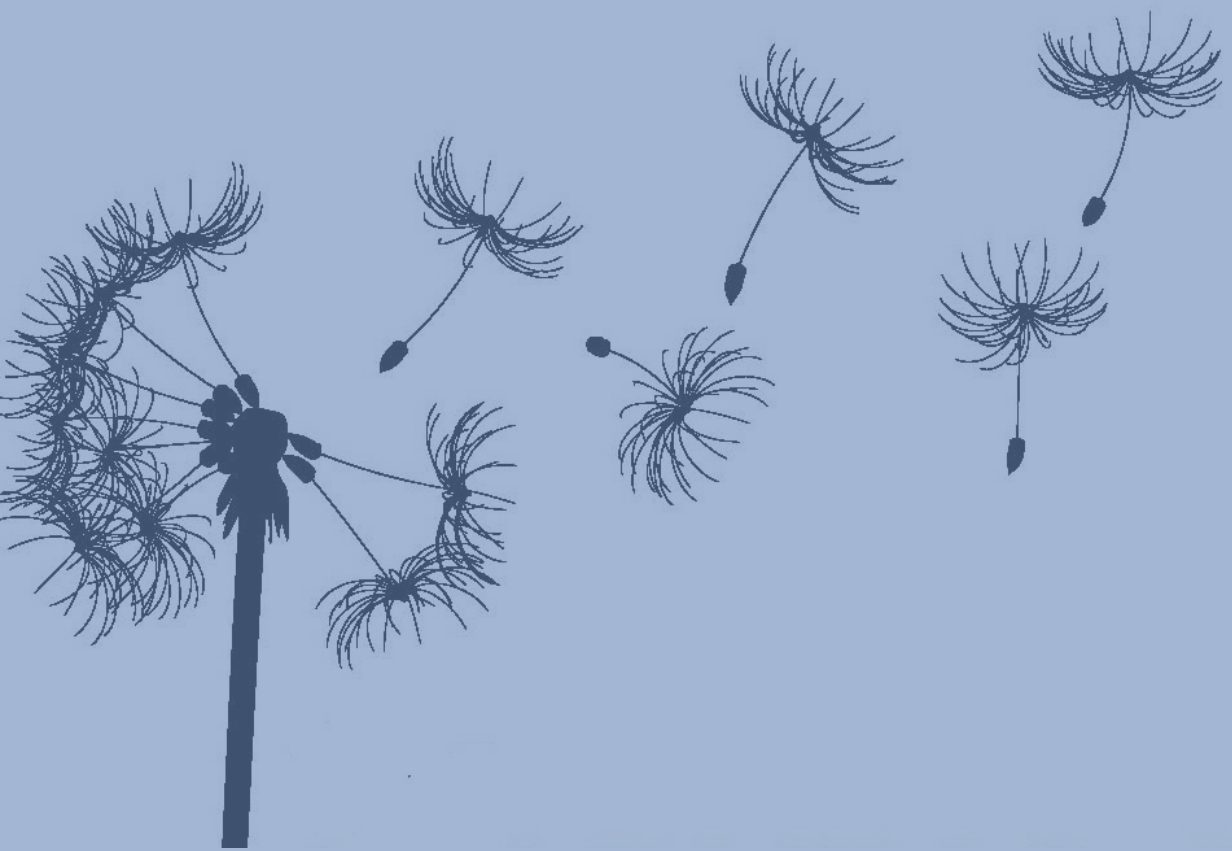
When you are tempted to let a bad behavior slide, ask yourself, "What if everyone in the company exhibited this behavior?" If you visualize the behavior as it scales across the organization, you will see the urgency. This can be a helpful shot of motivation.

When you see the behavior that is not what you expect, ask the responsible person directly: "Why is this ok?" Help them see the gap that you see. If they don't see it, they can't close it.

Behavior drives culture. Culture drives results. You might expect performance, but in the end, you will get what you're willing to tolerate.

Learning & Development

The Superpower of Instructional Design



The Superpower of Instructional Design

By Emerson Consultanting Manager, Julie Rodgers

My teenager loves superheroes. Her favorite is Captain America. (In fact, she is convinced she is related to him because we share the same last name.) Recently she asked me, "If you could have any superpower, what would it be?" We spent the next 30 minutes debating the merits of various superpowers.

The next day, I went into work with superpowers on my mind. I found myself wondering, "What is the most valuable instructional design (ID) superpower?" I considered the many ID skills needed – creativity, investigative, problem solving, technical, and people skills, to name just a few. Then it hit me. The most valuable ID superpower is one of the most underrated skills – empathy.

Renowned author and psychologist Daniel Goleman lists empathy as a key element to emotional intelligence. In a nutshell, empathy is the ability to walk in another person's shoes and understand their point of view. It requires emotional intelligence because it involves detecting subtle cues and sensing unspoken feelings and emotions.

Empathy is an instructional design superpower because it enables us to paint a multi-dimensional picture of our learners. We are often limited to just a few learner demographics - job title, location, language, prerequisite courses, and average years of service. But learners are human beings who can't be reduced to a few facts. We need empathy to fill in the blanks, know our learners, and meet their needs.

This insight doesn't happen overnight. Terence Brake, author and L&D expert, describes this as a "process of discovery rather than an instant blinding flash of insight. It demands time, attentiveness, and perspective to fully comprehend and act."

To better understand our learners, we must immerse ourselves in their worlds:

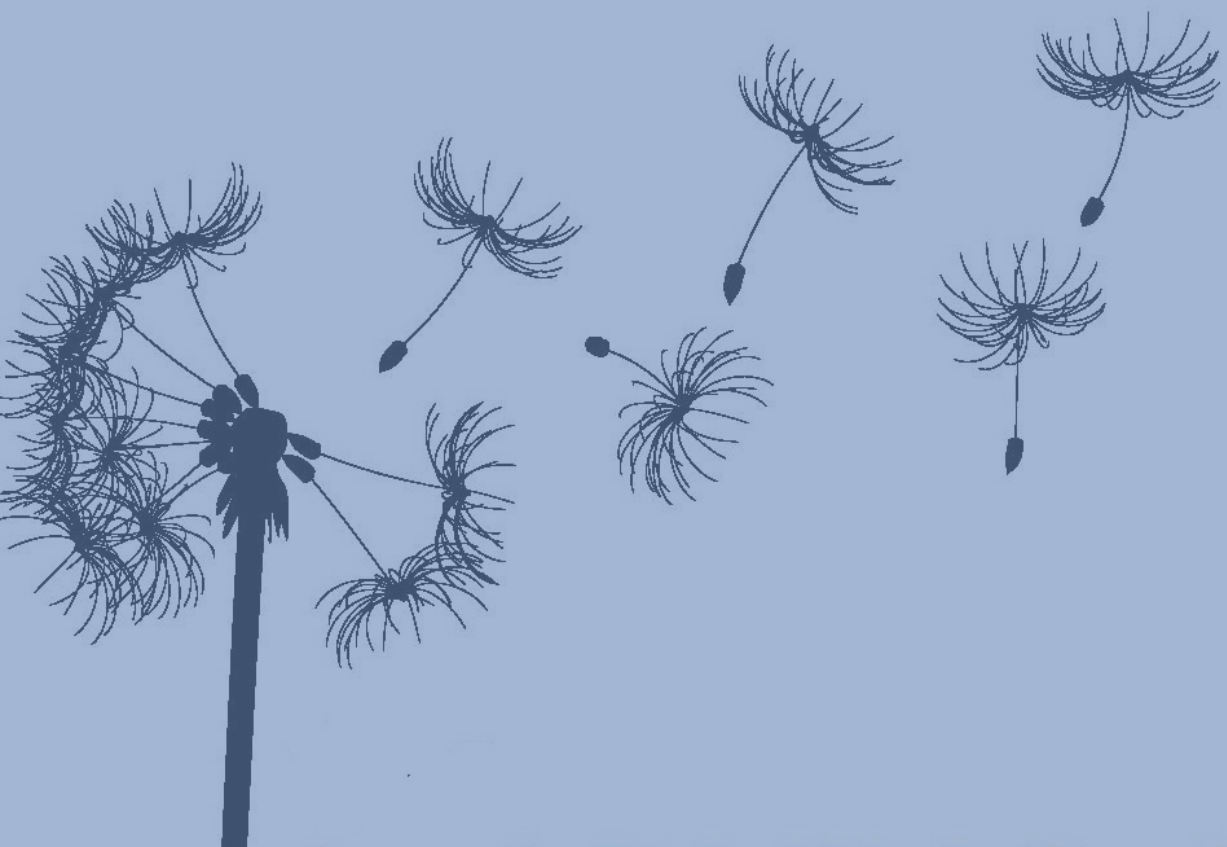
- What do they do, see, hear, and experience?
- What are their day-to-day interactions?
- What are their influences, distractions, pain points, limitations, and areas for improvement?
- What are their goals, values, and expectations?
- What are their skills and competencies?

Ask questions and then really pay attention to the answers. Listen to the words being said but also the emotion behind the words to understand how they are feeling about the change. Are they anxious? Excited? Apathetic? Proud?

Empathy provides instruction designers with x-ray vision into the lives of our learners and helps us understand what motivates and inspires them. Using this information, we can design solutions to fit their wants and needs. Empathy is my favorite superpower. What's yours?

Learning & Development

Give Learners the "Why"



Give Learners the "Why"

By Emerson Consultant, Randi Boswell

When I was a waitress in college, before the end of every shift, I had to "roll silverware." LOTS of silverware. Stack knife and fork on top of a napkin, fold in bottom, then left and top corners, and last wrap right corner around and tuck in to hold. Repeat, repeat, and repeat. Repeat. Repeat. Repeat. And on … and on. Does this sound like something to smile about? No.

So, imagine my wonderment when someone would walk by and say, "What's wrong? Smile, Randi!" I would oblige, they would leave, and I would return to a rational expression. (What kind of fool smiles at silverware? Why am I expected to show affection for these utensils?) Their insistence was nonsensical. After all, I smiled quite adeptly at actual people – customers and coworkers, deliverymen, garbage collectors, and even random passersby. I didn't have a smiling problem, did I? Why should I start smiling while I rolled the utensils?

Flash forward to 2018 and my delight seeing news stories of Russian workers being taught to smile before the World Cup began.

The very idea of smile training cracks us Westerners up (pun intended). But Russians aren't accustomed to "smiling for no reason." In their culture, it is seen as a sign of stupidity. (Vindication! Take that, silverware lovers!) In fact a Russian woman once said she'd been questioned by police for her "suspicious smiling."

An anticipated 1.5 million foreign soccer fans gave Russians a legitimate smiling challenge and an opportunity to rethink their unsmiling ways (even if would be only a "smile-cation"). They wanted to appear welcoming and leave a positive impression. They had a great big why to back up smile training before the masses descended.

Back in my waitress days, you couldn't have convinced me to learn to smile while I rolled silverware. But an entire city of Russians understood why they had to learn to smile.

How can we apply this to our training programs? How do we make sure our learners understand why they must change their behavior? Yes, we can simply tell them the reasons, but how do we make the why integral to the training?

Be brave. Don't be afraid to let new employees interact with real clients and customers before they're 100% ready. Restaurants are great at this. Before a grand opening, family and friends are often invited in for a complimentary meal. There's nothing like a real-world situation to help people up that last bit of the learning curve. Real customers help restaurant employees understand why they need to be ready. Make this work for you -- invite select clients or customers to help you improve your service to them.

Go live. Or live-ish. If you're doing systems training, set up a simulation or training environment that feels real. Faced with a system that behaves like the real thing will help learners realize they are about to impact the business – that' a big why. Even more compelling: have them finish learning using the live system. Plan for it, supervise learners, and train in controlled, small steps.

Leverage experience. Your experienced team members make effective coaches. They know the business and can share real examples. There's nothing like a first-person story of success or failure to convince an employee they need to be ready to perform. A coach can also lead role plays, acting as the client or customer, and present challenges to trainees. New employees can begin by shadowing their coaches, who can then monitor and guide them through their first on-the-job tasks.

Maybe, back during my waitress days, a compelling why would have motivated me to smile my way through menial tasks … maybe. I have learned the value of a smile, though. And when it comes to achieving speed to performance, making the why of training as compelling and real as possible is good for business. If you succeed? You'll leave 'em smiling … no additional training required.

Want more on Russian smile training? Watch this.

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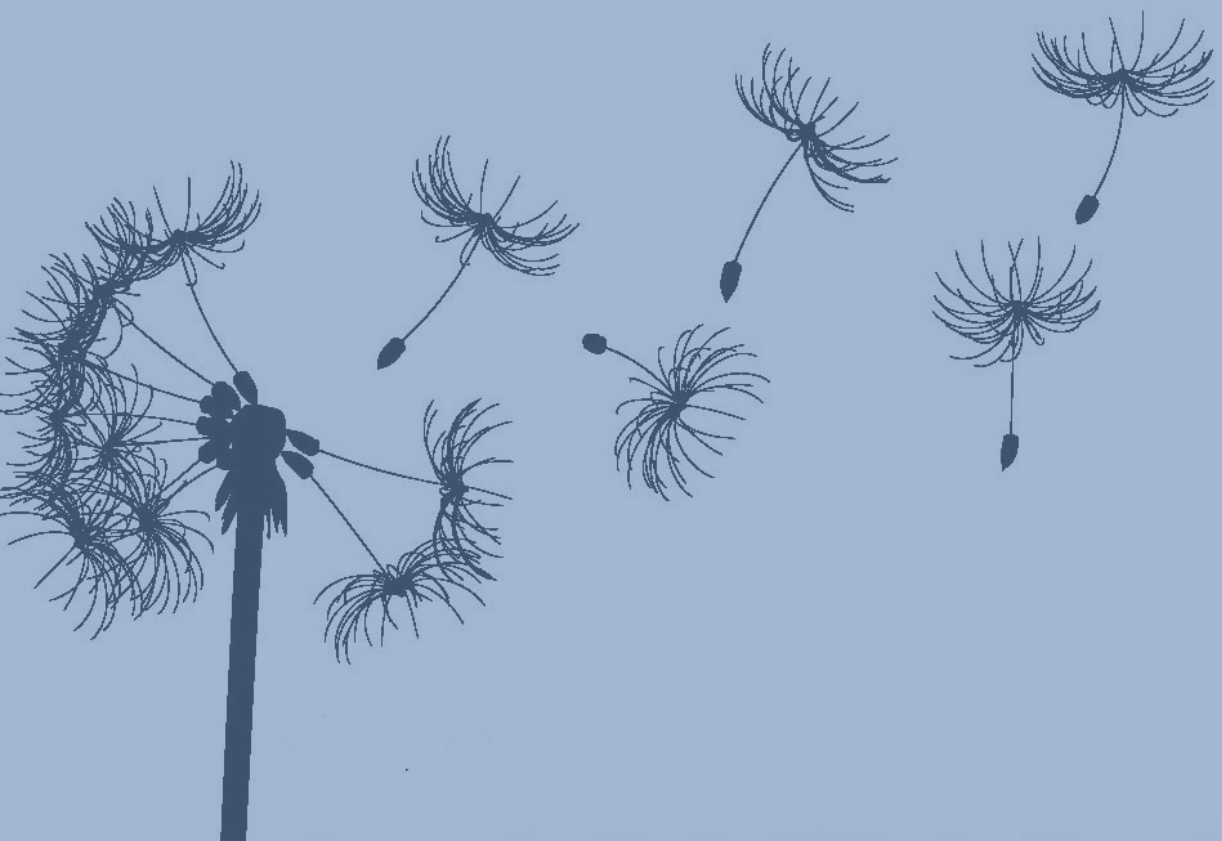
Use Stretch Goals to Improve Performance



Use Stretch Goals to Improve Performance

By Emerson Consultanting Manager, Chris Pennington

Everyone is familiar with goals and setting goals, but what about stretch goals? Stretch goals push and inspire people to accomplish things they might not have thought possible.

Research shows students actually perform better than others when they are expected to do so. This concept is played out in a scene* from the movie Facing the Giant. A football coach challenges one of his players to the "Death Crawl" drill (crawling on all fours while carrying another player on his back). The drill is set up for the player to crawl 10 to 20 yards. The coach tells the player that he wants to challenge him to go 50 yards. The player balks at this idea, and the coach responds, "I think you can go 50 yards with someone on your back, but no matter how far you make it – I want you to give me your absolute best!" Before the player starts the drill, the coach blindfolds him and says, "I don't want you to stop when you think you've done enough; I want you to go until you absolutely can't go any further." The player starts the drill with the coach pushing, encouraging, and continually telling the player to keep going just a little bit further. Finally, the player collapses, totally exhausted. Out of breath, he mutters "That's got to be at least 50 yards." When the coach removes the blindfold, the player discovers he has made it all the way to the other end zone! He didn't think he could make it 50 yards let alone the entire length of the football field!

It is truly astonishing what we can accomplish given the right circumstances. Here are five principles to keep in mind when setting stretch goals:

Stretch goals are called "stretch" because they are very difficult to meet. If the standard is easy to achieve, it's not a stretch goal.

Stretch goals are not goals people are required or expected to meet. No one should be punished or criticized for not meeting a stretch goal.

Performance against stretch targets can affect other parts of the organization. If employees become more efficient or increase output, they'll change something about the business process. Know the upstream and downstream impacts of changing employee behavior.

If people are not given the knowledge, tools, and means to meet stretch goals, the effects can be disastrous. If the goal cannot be met because of lack of support, it has the opposite effect on motivation, productivity, and teamwork.

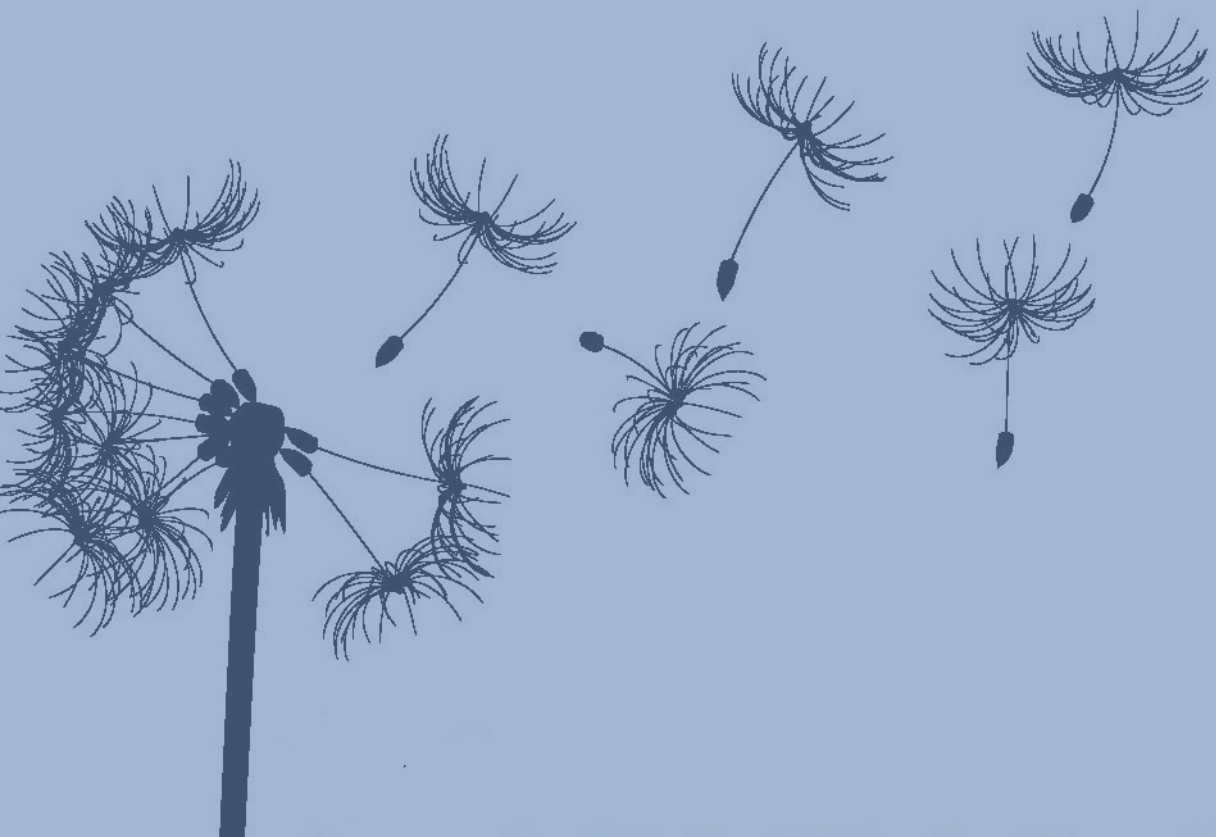
Risk-taking should be encouraged and rewarded, even if it fails. Remember, there's no penalty for failing to meet a stretch goal. But go one step further and reinforce the impulse to try. For example, one company builds failure expectations into performance reviews – they expect one significant slip-up per year.

Stretch goals are a powerful tool when executed properly. They enable people and organizations to reach new heights. Remember what Henry Ford said, "Whether you think you can, or you think you can't - you're right."

**Click link to see a clip of the movie scene: Death Crawl .*

Learning & Development

Time Management for Trainers



Time Management for Trainers

By Emerson Consultant, Afreen McKnight

When it comes to training, there are things we need to do, things we should do, and things we would like to do. We all understand that. However, we often find ourselves reacting and doing what seems best at the moment. We don't necessarily focus on the top priorities.

How many times have you found yourself facilitating a training session and realized you were running out of time with too much content left to cover? At this point, you either skip content or speed up to make it to the finish line!

The problem doesn't start in the classroom. It happens because we want to achieve more in our training programs than we have time for.

One way to address this is to use the Eisenhower matrix to manage tasks. The matrix helps you focus energy and time on the most critical elements of your program. All other tasks fall in line behind the most important; they are rescheduled, deleted or delegated to someone else for completion.

What is the Eisenhower matrix?

The Eisenhower matrix was developed by former President Eisenhower to help prioritize his work. It forces you to assign an urgency and importance to each task, which puts the task into one of four quadrants. The result is a list of targeted tasks in each quadrant and a strategy for each list.

How do we apply the matrix to training?

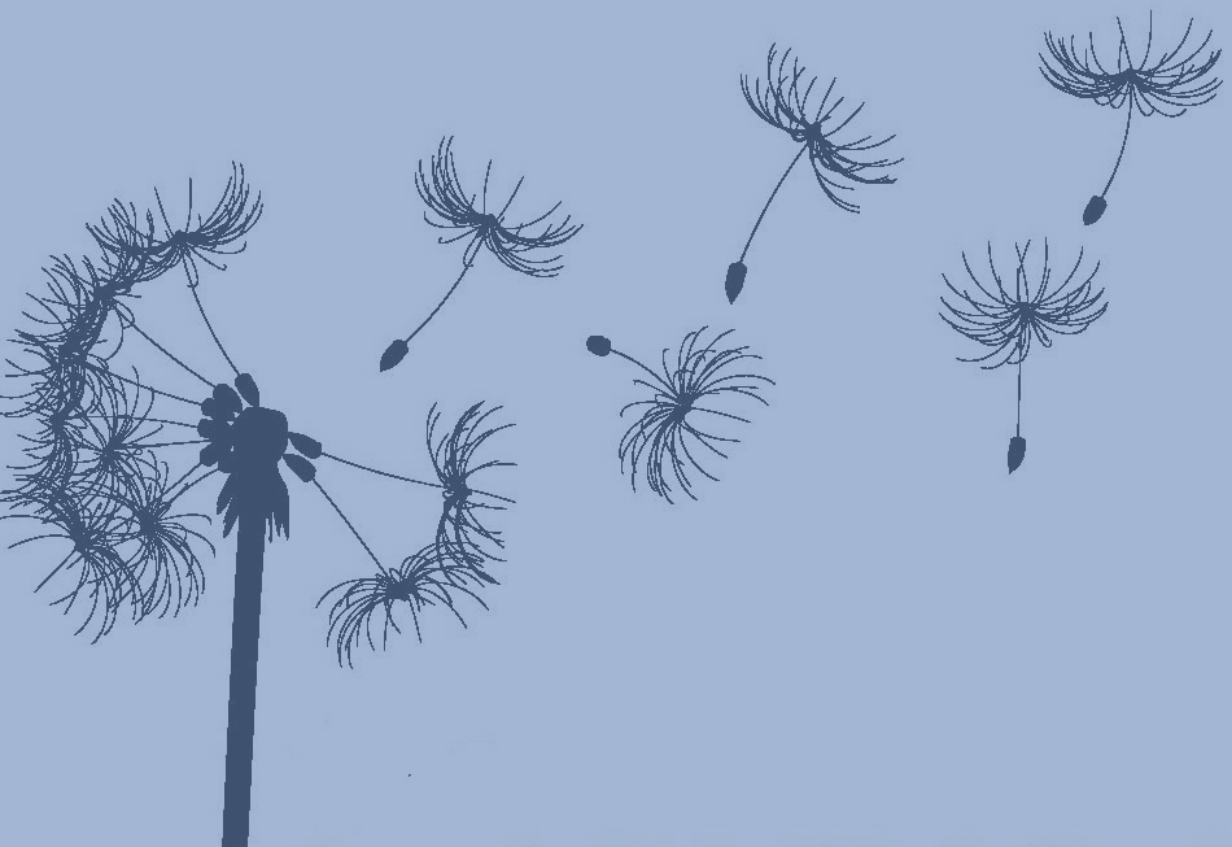
Think about the goals of your training program and each task you need to complete. Then place each task in one of the four quadrants. Use these descriptions to help you decide.

Quadrant 1	This is the "do now" quadrant. Put the most critical and urgent training tasks in this quadrant. These tasks must be finished first to avoid negative consequences. This quadrant is a home for reactive tasks that help us avert crisis, meet deadlines and address pressing problems. Example: training your learners on a new product feature that they need to start using immediately.
Quadrant 2	This is called the "schedule" quadrant. The tasks are important but less urgent and can be scheduled on the calendar for a later time. This is where you want to invest most of your time so that you can be proactive and recognize opportunities. The tasks in this category are in line with your long-term goals and help build consistency. Example: scheduling a training session for a product feature released in the next six months.
Quadrant 3	This is the "delegate" quadrant. Put tasks that are less important than the tasks in Quadrant 1 but still urgent. The tasks in this section cause frequent interruptions and keep you busy, but don't help you achieve your goals. You can check the progress on these tasks through email, phone or meetings. Example: testing a specific feature of the system. You can ask your learners to test the feature and report their findings to you. This task is important but can be delegated to your learners.
Quadrant 4	This is called the "delete" quadrant because the tasks in this section are not urgent or important. These tasks are a distraction and keep us away from accomplishing the goals of the training program. Think about tasks that don't serve a learning goal and consider eliminating them. Example: developing learning activities that are flashy and fun but don't help learners meet a training objective.

Using this matrix will help you achieve more by focusing on less. As a bonus, your learners will thank you for not overwhelming them with content.

Learning & Development

5 Ways to Evaluate Training Success



5 Ways to Evaluate Trianing Success

By Emerson Associate Director, Chris Harper

"Our training program was a success!" Was it though? How do you know?

Most of my clients ask participants how much they liked the program. If the participants say they liked it, many learning professionals claim training success.

Sure, we want participants to enjoy the learning experience, but that's not our goal. Saying you liked the course is pretty imprecise – maybe you liked the jokes the facilitator told, and the lunch served by catering. And those evaluations can't measure achievement of learning objectives, which are about behavior. Changing performance is a better indicator of success.

More often than not, learning professionals perceive that it's too difficult to measure performance change. It really isn't, though. Here is a range of metrics used by the business leaders I've worked with.

Satisfaction: This is the "did you like it?" measurement. It gives us information on the participants' impression of the program. Typically we use end-of-session surveys about the quality of materials, program delivery, and the overall experience. In many cases, this is where evaluation ends. However, to truly define success, you have to go further.

Learning: This gauges the extent to which participants believe the program achieved its objectives, and how well reaching those objectives met their development needs. Often we ask participants to report what they learned, but sometimes we can use knowledge checks or an end-of-session test.

Application: This measures how well participants apply what they learned to their jobs. In most cases, I recommend asking participants, at the end of the program, what they will apply on the job. Then, follow up 60 to 90 days later and assess what they actually applied. I also recommend that supervisors rate participants' application.

Performance: This is an assessment of changes in job performance. The evaluation typically targets key business indicators like quality of work, customer satisfaction, speed-to-market, sales, etc. Ideally, we would measure the extent to which a participant's new skills impact business results. Again, I recommend an end-of-course survey asking participants to predict how their new skills will change their performance. Then follow up 60 to 90 days later and measure how performance actually changed and how those changes affected business metrics. Again, supervisor ratings are important as well.

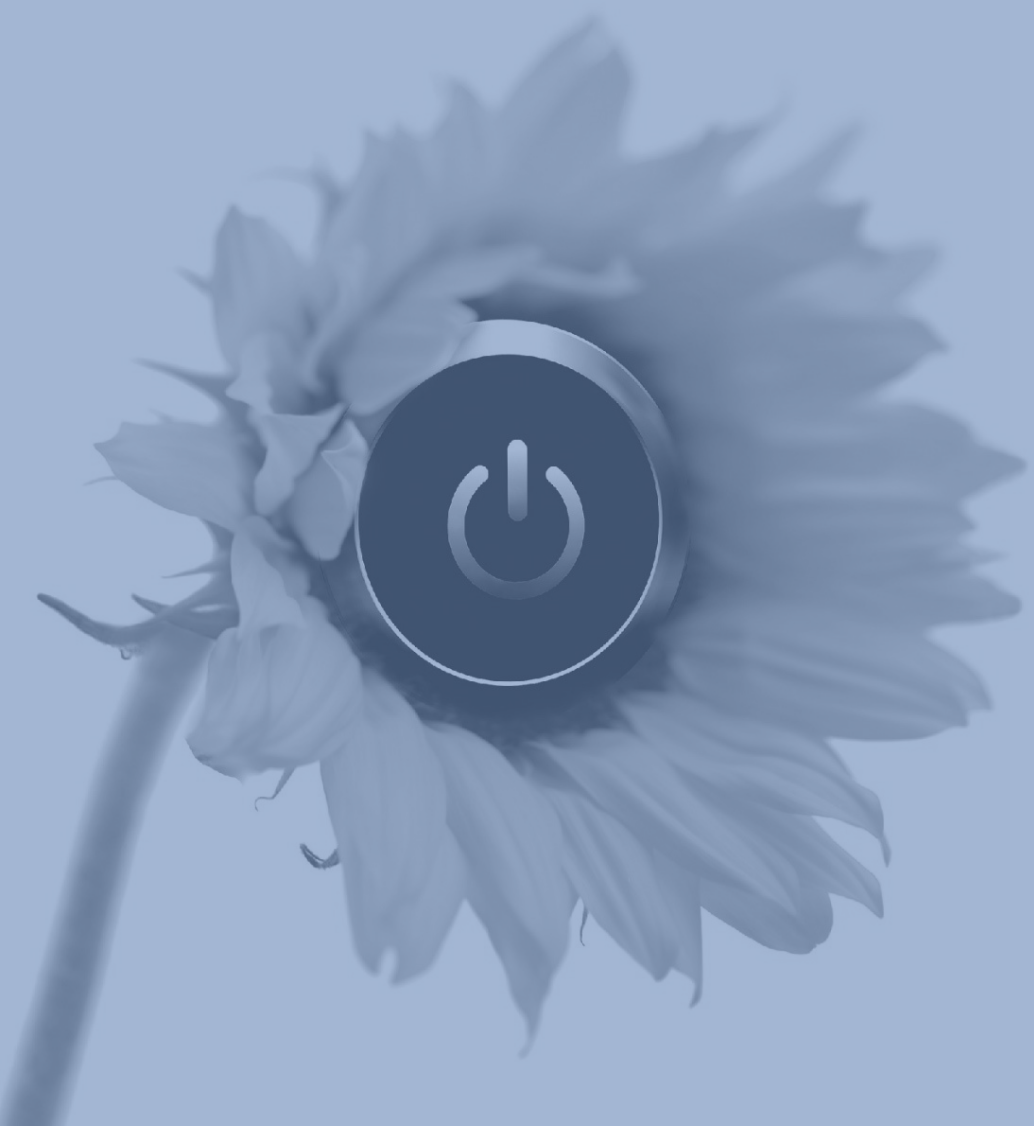
Recommendation: This is somewhat related to satisfaction. This evaluation asks participants whether they would recommend the program to someone else. It's a good measurement of perceived value of the program.

Collect this information consistently across all of your programs. This allows you to compare the performance of individual programs or courses. It's also helpful to measure the same program over time. These broad views of your curricula help you pinpoint problems and focus improvement efforts.

Gathering evaluation data doesn't have to be difficult. The metrics are straightforward and easy for business leaders to understand. Focusing on these five measures will help you build and maintain strong learning programs that deliver business value. And it will help you demonstrate training success to your stakeholders.

Technology Change

Training for the Cloud



Training for the Cloud

By Emerson Director of Learning and Development, Freddy Mitchell

My granddaughter is about to celebrate her 1st birthday. I can't believe how fast a year has gone. My daughter asked me to help create a birthday video using pics and video clips we've all taken this past year. We set up a cloud-based storage location for all family members to contribute to the video. It was easy to set up and seemed intuitive. Well, sort of. Aunt Martha did not find it easy to use or intuitive.

This is one of the big myths of cloud-based applications: They don't need a robust training solution. Wrong! You must remember:

Aunt Martha isn't in the cloud. An effective training solution must consider your audience. You might have tech-savvy audiences, which means your training solutions can be quite nimble and fast. Aunt Martha needed me to sit with her and walk her through each step, several times. She asked me to write down the step-by-step instructions. She then insisted I set her up on "speed-dial" so she could call me if she had trouble.

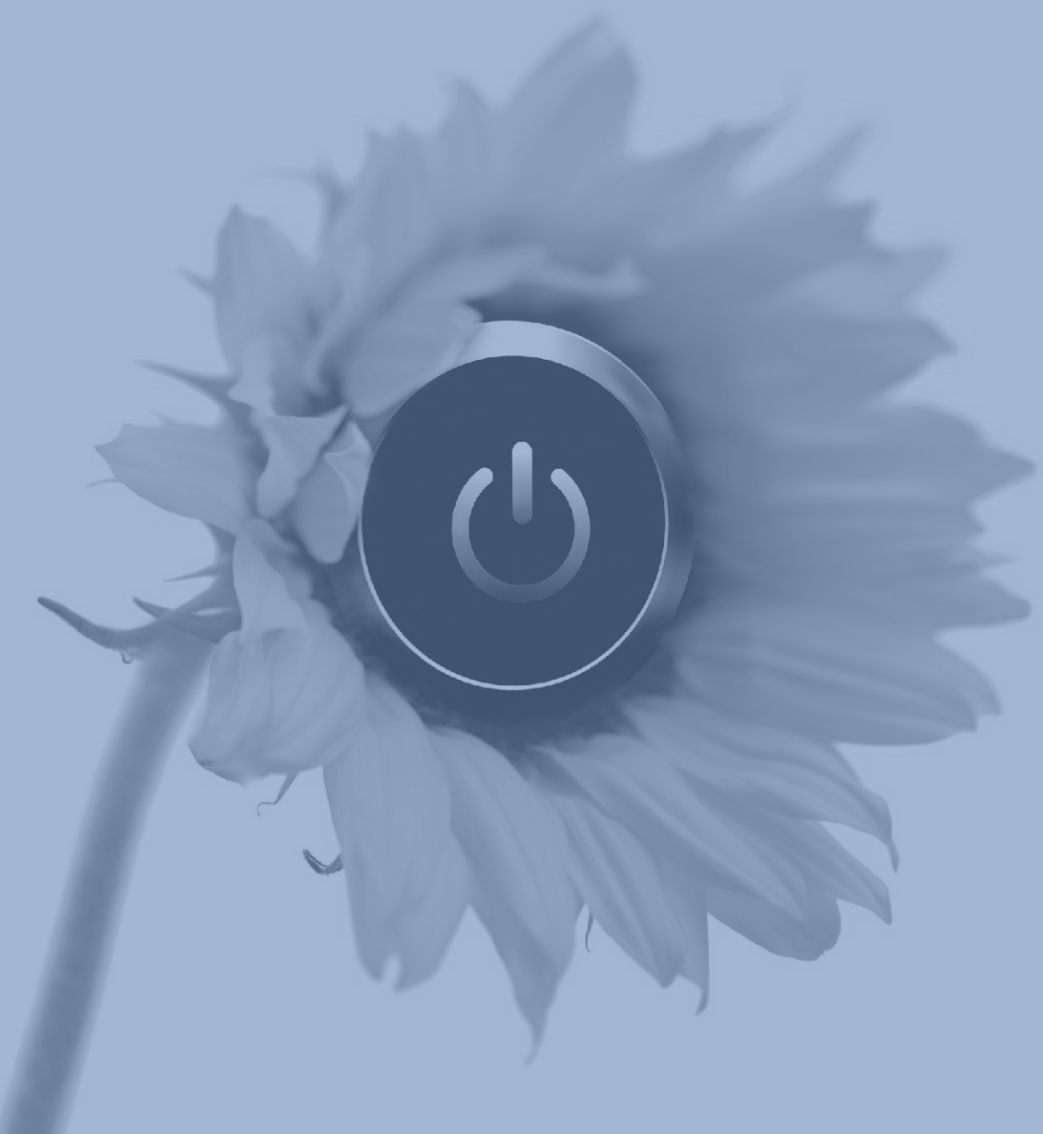
Aunt Martha doesn't know the process. The cloud-based application is a tool. It enables people to do their jobs (like create an awesome baby video) more effectively. Sometimes the application supports the processes through customization or workflows, but sometimes those are add-on learnings for users. Aunt Martha didn't know how to take a pic on her phone and then transfer it to the cloud drive. She didn't know how to find pics on her phone! This meant I had to give her training beyond just using the cloud application, to make sure she could follow the process. I also had to incorporate these extra steps into the existing training, so she could see how it all fit together.

Aunt Martha doesn't like this one bit. With any training, especially technical training, we tend to focus on the business process and system steps to accomplish tasks. If that's all you do, you might be moderately successful. But truly impactful, results-driven training focuses on key behaviors. Beyond the system or process, what behaviors are you trying to encourage? Aunt Martha didn't trust the system. She didn't trust the pics wouldn't be stolen or somehow removed from her phone. But I wanted her to share her photos with us – that was the key behavior. So I set up alerts on our cloud drive; they notified me anytime Auntie loaded a pic. When I received a text, I immediately texted her, saying, "I see your added pic. Thank you! Now, check your phone to make sure it is still there." Over time, she began to feel accomplished and to trust the system and the process.

Many cloud-based applications are easier and more intuitive than ever – for some people. We must not lose sight of human factors outside the application that cause system implementations to fail. Don't just assume that, because it is in the cloud, it's easy. Don't assume that, because there aren't that many changes to the process, people won't need training. I followed these principles, and they worked. Aunt Martha shared all her cute pics. And she might not be what you'd consider tech-savvy, but she is using a Google Drive!

Technology Change

Sandbox or Simulation?
Choose the Best Practice Tool



Sandbox or Simulation? Choose the Best Practice Tool

By Emerson Associate Director, Kristin Sleeper

Learning a new skill usually takes practice -- sometimes, lots of it. For some skills, people need to practice in a safe place before applying them on the job.

Consider what it takes to learn to fly a plane. You wouldn't want the pilot practicing their flying skills for the first time on your flight! They need a lot of practice in a safe, simulated environment before they ever attempt to fly a real plane. The same holds true for employees who will be required to use new technology to do their jobs. When it goes live, you don't want their first time with the system to impact the business.

So you need a safe space. That usually means a training environment or system simulation. Which one should you use to let users practice? Here are some pros and cons of each:

	Training Environment	System Simulation
Pros	• Provides the most realistic experience for the learner. • Allows the learner to practice and "play" in the system; they can go at their own speed and explore the system, repeating practice as many times as they need to learn.	• Provides a structured learning path for users. • All learners have a consistent experience. • Large numbers of users can be trained at once, across locations. • Requires less ongoing maintenance. • Typically, less expensive to build and maintain.
Cons	• Typically, more expensive to build and maintain. • Usually requires more ongoing technical and instructor support. • The learner experience is not perfectly consistent across users and locations. • Sometimes there are limits to the number of concurrent users, IDs and passwords. • The training environment must be updated any time a system update goes live; the two must be in sync. • The system development team is more focused on the staging and production instances, so your support for the training instance might be limited. • Need to create training data for activities, duplicated for the number of simultaneous learners you'll have in the instance.	• Practice isn't as realistic; there will be differences between what they learn and do on the job. • There's no opportunity to "play" within a safe system. • Learner's pace is determined by the simulation which could diminish retention.

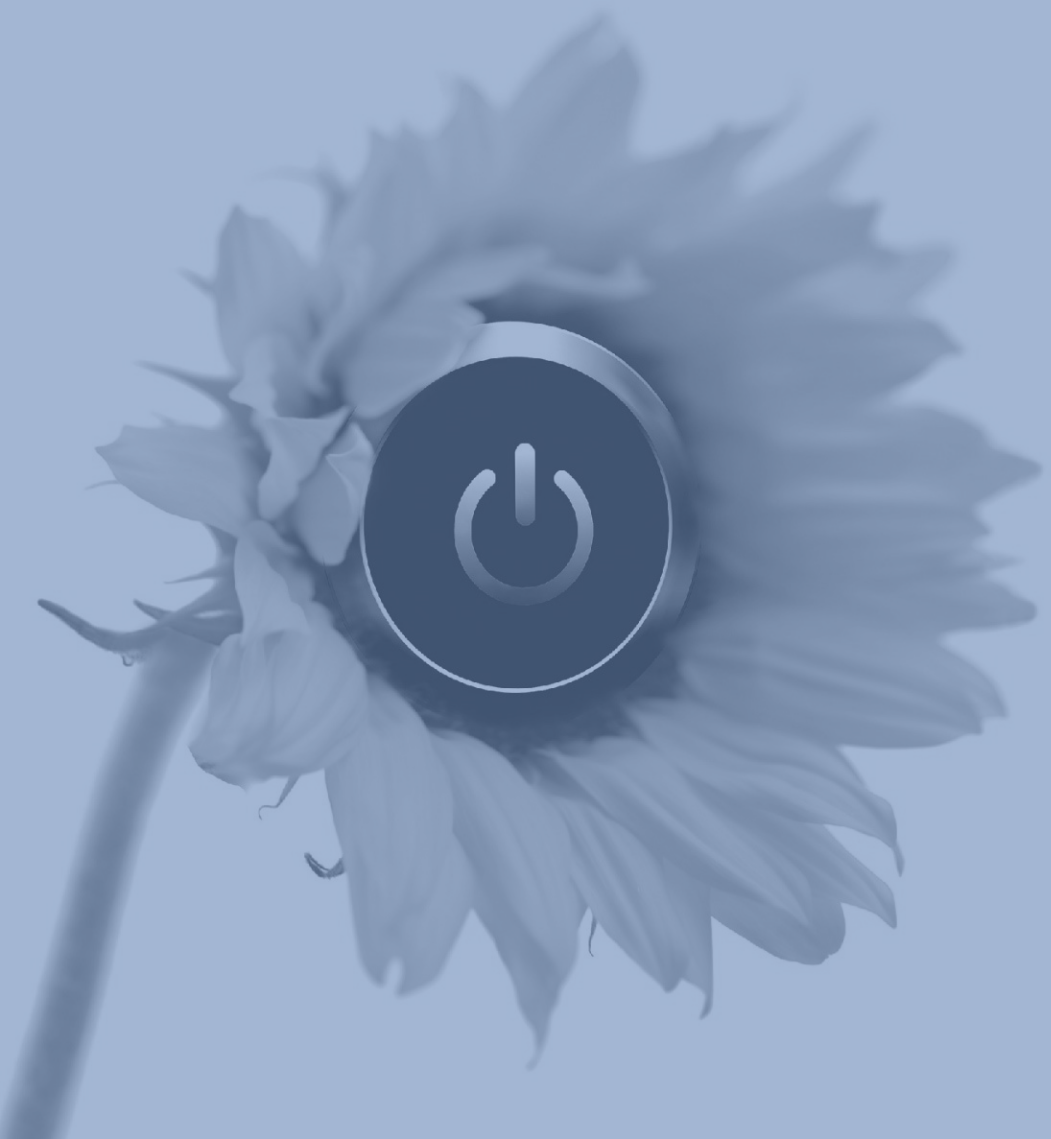
So, how will you know which solution is best? These questions might help you decide:

Is This You?	Training Environment	System Simulation
We have very limited time and resources before go-live.		X
It's essential that users perform well day one with no dip in productivity.	X	X
We'll need lots of ongoing system training and support after go-live.		X
Stakeholders need/want lots of time to play and get comfortable with the system.	X	
Training and practice must be precisely the same across very large numbers of people and many locations.		X
The jobs are complex; people need to work in teams and practice many "what if" scenarios.	X	X

This should help you ask the right questions and evaluate the unique needs of your project. At the end of the day, it's all about making it as real as possible for the learner and ensuring they can "fly that plane" when it really counts!

Technology Change

Build System Training Around Roles and Process



Build System Training Around Roles and Process

By Emerson Instructional Technologist, Mike Cassady

When you first learned how to ride a bike, you probably weren't concerned with all the bike's parts, the available accessories, or the tricks and techniques professional riders used. You just needed to know when you could ride, where you could go, and how to use your new bike to get there. After all, you had stuff to do; there were places to explore and friends to see!

Getting your first bike is not unlike using a new system. There's a lot you could learn about the new technology, but your objectives remain the same: you still need to get your job done. When we got our bikes, we weren't learning backflips and BMX tricks; we were moving faster down familiar streets. We were taught just enough to take advantage of this new tool. Another term for this is targeted, role-based training. You need to learn what it takes to do your job. Everything else is superfluous. It should be the same with any new technology implementation.

Too often, companies implement technology on top of their existing processes and then offer general system functionality training. They expect everything to fall in place just because users have that new tool. I've already written a few other posts about making the case for new technology, and how training for that technology must be customized, but I want to explore the problems with this one-size-fits-all approach.

First, not everyone uses a new system in the same way. It's grossly inefficient to teach all forty features to someone who needs to use only four, another who uses a different six, and so on. It's costly, not to mention boring, frustrating and counterproductive for those learners. You can save time, money, and sanity by providing just enough training instead of way too much.

Second, system functionality training often exists in a vacuum, with no context for the greater process. Your learners don't just need to know **how** to do something, they need to know **when** and **why**. It's overwhelming to have all that information thrown at you without knowing how it helps you do your job and deliver outcomes for your team or your company. And, for example, if something breaks upstream and people aren't familiar enough with the new handoffs and overall process, they can't adjust and correct.

Lastly, system functionality is a dry topic. There aren't a lot of ways to make it interesting and interactive. But if you teach the system in the context of the greater process, you can craft a story around this new journey. This is essential -- if the training isn't engaging, your learners will struggle to retain their new skills. They might end up with harder jobs than they had before. Change is already hard; we don't want people frustrated with a new tool when it's supposed to make life easier.

Instead of teaching general system functionality, you should be providing targeted training for each role in the context of the greater process, which creates a storyline to engage your learners.

It starts by identifying who is affected by the technology change and how much. Where do your processes change? What does each person need to know to keep the ball rolling? Be thoughtful during your analysis: some people might have the same job titles but do vastly different tasks using the new system. Likewise, people in different departments might have similar roles within the system. Make sure you accurately capture your audience, so they receive the proper training.

Once you have new processes, roles, and responsibilities figured out, you can develop an efficient, holistic curriculum that helps your learners achieve their daily objectives. With that in place, any new technology should feel just like riding a bike.