

So we talk about recapping our journey. It's important we start to talk about the fact that when change occurs, it occurs because something has happened. There's some reason why we have to have change. And I like William Bridges' quote here that it's not the actual change itself that does us in. It's the transition. It's that period of time where we're going from the old way of doing things to the new. And so it's important we remember that as we're looking at change metrics. 70% of all changes fail, 30% of all changes succeed. In anything we do in life, if we failed 70% of the time, we would be thrown out. In the stock market, you'd be broke. If you failed 70% of the time at your job, you personally, only always successful 30% of the time. You're not going to be successful. You're not going to be in that job very long.

The only thing I can think of, the only profession I can think of where if you can hit 30%, if you can be successful 30% of the time is really baseball. We haven't seen baseball for a while, but if you can hit 30% of the pitches thrown at you and successfully get to first base, that's a good metric. That's something that a lot of people strive for. That's the only place. In the rest of the world, if you fail 70% of the time, you are not going to have many opportunities to do it. And so with change initiatives, we need to think about that. We need to figure out how we're trying to change those numbers, how we're trying to rebalance them.

In our first webinar in this series, we talked about a burning platform. We talked about that pain message that we give, that we deliver, if you will, to scare the bejesus out of people, to get them to want to move. And we talked about the good and the bad parts of that. It gets people moving, but it gets them moving out of fear. And if we also talked about that burning platform as being a way to scare the heck out of people, over time, they're going to get fatigued from that. They're going to get, they're going to say, "Oh, here we go again. Yeah, yeah, yeah. Right." Everything's going to fail. And so we need to think, we need to consider that in our messaging, and we've spent a great deal of time talking just about that subject.

We talked about fear and where does it live. So we've delivered a burning platform message. We've delivered the reason why we need to move. Where does fear live? It doesn't live in the human brain. It doesn't live in the mammal part of the brain. It lives in the reptilian brain. That's where our fight or flight sense is. The reptilian brain is the oldest part of the human brain. And so when we do that, we react. We may not necessarily react well. We may not react in a way that's productive. We may just grab at the first thing we can think of and move without really understanding what the impact is of that is going to be. And as we've discussed before, that's not optimal. That's not something that is good for us.

So we want to think about that, and we want to get to the point where when we're moving, using the burning platform type message, the big change vision, we want the human brain or the cognitive part of our brain where we're reasoning and understanding and rationalizing. We want that part of the brain to be what we're actually using, not the reptilian brain. We've also talked about the pace of change. We talked about the fact that change is unique to each individual, that some folks will be early adopters and will move very quickly. We've talked about other folks will follow them. We call those early adopters. And then following the early adopters is the early majority. And that's really where you start to see things go viral. You start to see where, especially toward the end of that as we're getting near the peak on the bell curve, you start to see people all of a sudden start jumping on board not because they want change, but because they want to be like everybody else, and they want to move forward. And the costs start coming down in terms of that change and acquiring that change.

We all accept change at different paces. And we all accept change at a different rate depending on whether it's forced upon us or not, whether it's in our personal life. We might have the latest and greatest software at home and PCs at home, yet at work, we're still using the software that we've been using for 30 years. We're still using Lotus 1-2-3. It depends on where we're at and what we're trying to

do. And when we talk about change, it's important that you consider that for your teammates, that you consider that as we're rolling out that change. Everybody accepts change at a different pace. So how do we bring along the early majority, the late majority, and the laggards? How do we bring them along so that we shorten this curve, if you will? We move them further to the left. So that's what we're trying to figure out, and that's what we need to consider as we're talking about digital transformation or change management.

Remember, and I mentioned this earlier, everybody's unique. We all talk differently about change. We all embrace change differently. We all learn at different speeds. We all have different cognitive abilities. Some of us have really big brains and we can take in a lot of information, but boy, we can't really learn very quickly. We can't change our ways. We can't adapt. So remember that everyone's unique. The person you think that is resisting you or pushing back on you or fighting you may actually just be slower at learning. It may take them a little bit longer. They may need to read every single thing, every single word on every single PowerPoint deck that you give them. They may need to take it away and consider it and then go back and read it again. Everybody's unique. And so we, as humans, we need to think about that, from our teammate standpoint as well as our own standpoint.

How quickly do we learn? How quickly do we accept change? When we talk about emotional intelligence, that's part of it. How quickly understanding what am I feeling, and how do I accept change? And that's what we want. We need to recognize as we go forward.

When we talked about change, we talked about volatility, uncertainty, complexity, and ambiguity. VUCA, as you'll hear it referred to. We talked about this quite a bit in our last session where we talked about change management for humans. It's this volatility, uncertainty, complexity, and the ambiguity that cause us for our reptilian brains to kick in. It's our defense mechanisms. We start thinking about uncertainty in terms of, am I going to have a job? What's my job going to look like? Am I going to end up out? Am I going to be able to move with the change and learn new skills?

The complexity. How difficult is it for us to learn? The volatility. With what I'm learning today, is it really valuable? Is it something that is going to stay or is it going to change on me? And the ambiguity. We really don't have a good sense when we start a change, what that really means. We may have the plan laid out. We may have Gantt charts and communication plans and all kinds, detailed tasks lists and all that stuff. But does it really work that way? So ambiguity can help drive that feeling in us that we've got to flee or that we've got to fight, that reptilian brain reaction.

Last week, we also talked about traditional thinking and the fact that many people believe that when you go and do organizational change, that you're really trying to get everybody heading in the same direction. And we talked about how the programs also whether it's Lean Six Sigma, TQM, Nexus, whatever safe, Scaled Agile Framework, whatever change management program you're using, we all assume that everybody's going to go in the same direction. We present the material and everybody's going to move. And in reality, in my opinion, it's often a lot like hurting cats, because everybody, going back to my original points, everybody's unique. Everybody listens to and accepts information at different rate. They learn at a different rate. So in a lot of ways, we have to be flexible. We're going to have to be iterative. We're going to have to be incremental in how we approach it. And so it's really important that we think about that when we're doing a program, when we're doing a change.

This is something I think that most of us don't really get. We really don't understand. We as humans are pattern-seekers, which means we look at a situation and if it's close to something that we've either learned in our past or done in our past and experienced, we're going to try and make it and say, "Well, this is what it is. And it's going to turn out like this." We look for those patterns. It's what's kept us safe. It's what's made us get to the point where we're at today. Because we've always looked for patterns.

We've looked for things that are basically the same. We got the same input. It should turn out the same way. We're pretty good at that.

And you'll notice too in this quote by Michael Shermer that when we identify a pattern, we'll go ahead and tell a story about it. And if we don't have a pattern in our brain that is exactly like it, we'll either find one that's pretty close or we'll find one in our fictional part of our brain where we're going to say, "Well, this is how this will turn out." We're always looking for that pattern, and it's helped us to this point. The problem is that everything, every situation is different.

And so while we can be pattern matchers and we can look for models and we can look for things to do, we have to understand that when we're doing that, that just because it looks this way, we have to dig deeper. It might work. We might say, "This is exactly what is going to happen again based on these inputs that I see." We need to go validate those inputs, and we need to be open to the fact that we could be wrong. We could be telling a story that doesn't really apply, that doesn't really apply to the situation we're in. And so I really liked this quote.

And then again, last week... Let's see if my slides will move. I also introduced to you the concept of the whole you. The head, the heart, and the briefcase. The fact that we in change management need to consider more than just the resume. We need to consider more than just the degree somebody has or the certification or the experiences they have, because there's more to it than that and we recognize that. We've all gone out and worked with people where we may have interviewed them and made the decision to hire them, and we bring them in and they don't fit in our culture. Or, they talked a good game about what they had done but yet when it actually came to applying their theor-, their experiences that they told us, we found out maybe they embellished those a little bit, or maybe they really didn't understand. Maybe they said they were the lead, and maybe they actually weren't. Maybe they just went along and follow the crowd.

We need to consider all three of those. The head, the heart and the briefcase. And so it's important because we're going to stick with this framework. And that's why I included this right here. Because as we move forward, this is the framework I'm going to use to try and talk about metrics. And it's also the framework we're going to use when we talk about, in a couple of weeks, we're going to talk about John Kotter's Leading Change model. A couple of weeks after that we're going to talk about the ADKAR model by Prosci. We're going to talk about how those apply, but we're going to talk about them in this framework. I could be just like every other person and follow the crowd and talk to you about exactly what Leading Change is by the book, by the briefcase. But that doesn't give you the background that you need. And so I really like this framework and we're going to use that going forward.

So let's talk about metrics. Perspective is everything when it comes to metrics. A metric that might be good for me, might be bad for somebody else, right? We have these opinions and it really depends on your perspective on what you're looking at and what metrics you should be looking at or utilizing.

So which metrics should we use? Should we use the metrics that drive change management or should it be business? Should we try to focus on the outcomes that we get or should we work on following the plan that we developed, and sticking to the typical change management approaches that we've used historically in the past? It's a balancing act at the end of the day, it's a balancing act from the standpoint that we need to be able to manage it and capitalize on what we've learned over the years from our change management experiences.

By the same token, if we develop the best change management program that we possibly can and we deliver, if the business doesn't get their outcomes, then that's not going to work out very well. So, we want to make sure that we get those outcomes, business gets those outcomes that they're looking for.

So when we talk about metrics, we just talked about the perspective, let's talk about the complexity of metrics, right? The complexity of metrics is that metrics, it can be overwhelming in terms of what metrics we try to use, right? Which ones do we use? Which ones make sense and which ones don't? The type of change we're doing and the complexity mattered a lot, right?

If we're doing a simple change that affects one team, we probably don't need to worry too much about those metrics, right, in terms of what we're doing. But if we're talking about an enterprise-wide adoption of 25,000 people, right, that's a whole different ball game. That's a whole different space that we're playing and the numbers change radically. So, complexity and the type of change that we're doing play into it.

The percent complete syndrome is a big influencer on metrics. When you think about how we've traditionally reported status, it's percent complete. We're 50% complete with this change initiative. What the heck does that mean? It means that we've maybe used 50% of the hours, it maybe means that we're 50% of the way through the schedule. It could mean that we don't really know where we're at, because we're relying on people to tell us how far they are in terms of percent complete.

So we want to start thinking empirically, we want to start moving away from people's judgment when we talk about how complete we are. We want to get down to measurable outcomes, we want get down to how many modules have we changed, if we're talking about development? Or how many features have we delivered to the business as part of the change initiative? Have we delivered 25% of the features, 30%, 40%, 80%? What's that number? We want to move away from taking somebody's gut feel and using that as value.

Complexity of metrics also is people do what you measure. I use the term coin operated. I apologize in advance for offending any salespeople that are here. But most of my experiences with sales teams are that salespeople will do exactly what you pay them to do. So, if you tell them that they have to make 30 cold calls a day and they have to talk to 15 people and they're going to get 10 meaningful conversations, three appointments and one sale every day, then that's what they're going to go do. If you say, "You got to have one sale," they might do any number of different things to get there. So depending on what you measure and what you're looking at, people will do what you measure.

I once had a guy suggest that we start looking at the number of Slack messages that people were sending out, or number of emails being sent out as a way of calculating engagement. What's going to happen as soon as you do something like that? Somebody's going to write a little bot that's going to sit there in Slack or sit there on the email, and send out emails or send Slack messages. Or if we're talking about code, if we're going to measure how many lines of code people put in, what are they going to do? They're going to comment, they're going to add lots of fluffy code that makes it look like they're doing a lot. So, we need to be careful about what we focus on and what we measure and how we use it.

Then the last bullet point, I think, is one that is still a big deal today, and that is metrics end up getting weaponized, especially in a low trust environment. If we don't trust what people are doing, we may say, "You know what? We're going to start evaluating you on how much you're engaged." Engagement might mean how many Slack messages you have, right? So rather than focusing on what's the outcomes, we're going to focus on the metrics. So it's important we think about that as we're going forward, what are the metrics that are appropriate for what we're trying to do?

So we're going to jump back into the whole you, and so this is where we're going to start talking about the metrics. Again, going back to the head, the heart and the briefcase. We're going to take an approach where we're going to talk about the easy one first, and that's the briefcase.

So, what is the briefcase? For those of you that were here a couple of weeks ago, this is repetitive, and I apologize for that. But for those of you that weren't here, what the briefcase represents is it represents

our education, our knowledge, our skills, our experience. It's the skills we have they want. When we go into a new job, what do we show up with? It might be certifications, licenses, degrees, our depth of knowledge, where we've been, have we worked at a small company, a startup, have we worked at a medium sized company, or have we worked in a Fortune 500.

The complexity of the role, are we in a very complex role where we've got a lot of moving parts, where we've got a lot of things we got to take into account, and do we have a wide scope of responsibility? Or is it something that is very narrow? So, that briefcase is important.

So, taking that approach and looking at metrics. We want to look at things like performance improvements, we want to look at projects and program KPIs, we want to look at benefit realization, ROI. In our business case, we outlined that we were going to return 35% return on investment. Did we get 35% return on investment? Was it 20%? Was it 40%? What was it? We also want to look at, from a briefcase standpoint, we're going to look at timelines. Did we meet the timelines? Do we meet the project plans? Did we follow the objectives? Were we on budget, in terms of what we originally planned and what we're trying to do?

Then we want to focus on things like throughput, errors, lead time and cycle time. Very much process-focused. Is the work going through and is it going through in a timeframe that we expect? Are we getting the efficiencies that we expected? So those are the briefcase metrics. These are the ones that we traditionally do. They're easy to calculate, right?

If you're using a tool like Jerry, you can go in and calculate throughput. If you're using Microsoft Project, you can very well go in and look at did we meet the timeline? How does our baseline Gantt chart look compared to what we actually did? Are we on budget in terms of hours and costs, or are we over? Are the lead times and cycle times what we expected? You can calculate those things, because they're tangible. It's easy for us to do.

This is where a lot of folks will go when we talk about metrics with change management. Those are very well-documented. You can go out and pick any change management site just about, and they'll tell you all the different things you need to calculate and all the different things you should do. That is important. It is important to have those metrics and to capture those.

When we talk about the head though, what we're talking about is the behavioral aspects, right? The drives, the cognitive ability, how do people learn? How do they behave based on their emotions? How do they behave based on the inputs they get? It's that reasoning, it's the part that separate us from all the other animals that are out there in the world, right? It's what makes us humans, right? We've got to try to figure out what drives their behavior. How is it working? How quickly do they learn? Do they have a big brain or do they have a small brain, right?

Big brain, meaning I can hold a lot of information, small brain, meaning I can only remember a limited. It's very limited in terms of what I can do. By the same token, right, that big brain versus small brain, how much information you can hold, is not a key to your success. A key to your success is how quickly you learn, how quickly you can adapt, right, from a cognitive standpoint. So, we also want to consider that.

As we're going forward, we're talking about a change initiative. So, what metrics do we use for that change initiative? Those are harder to measure. So we can look at proficiency, we can look at their awareness and understanding. Okay, so we understand what to do, do we understand why to do it? Do we know when to apply it? Have we done role-playing? Do we have those experiences? Can we figure that out? How quickly do we learn? How quickly do we iterate? Is there a lot of satisfaction?

This is where a lot of people will make that decision to either flee or fight, right? Are they satisfied? If they're not satisfied, guess what? And they're that way for a long time, they're probably going to flee.

They're probably going to quit or they're going to fight. Either way, you got a problem there, right? I'm not sure which one's worse, the person that fights back against the change or the person that just flees, goes along with it and says, "Okay, I'm going to go find something else, I'm going to be passive aggressive. I'm going to go along and nod my head, yes, and then I'm going to go find another job."

I'm not sure which one's a bigger problem, but that's something we need to figure out. How satisfied are people with the change? Are they satisfied with the process? How do they feel with it? Are they comfortable with where they're going? One thing you can look at as well as complaints, how many complaints are we actually getting through the help desk? Or how many complaints are we getting in our meetings? Do we do things like retrospectives of our teams, right, in terms of the change and how it's going? A lot of times we don't, and so we need to try to figure that out.

From an adoption standpoint, are they using the changes we're putting in, right? Are they being incorporated? What's our utilization rates? Are we at 10%, 20%, 40%, 80%, right? There's a certain amount of that that we need to understand, because if people aren't doing it, if they aren't applying it, they're not applying it for some reason, right? That reason might very well be that they don't get it, right? That they just don't understand. Maybe that they're a slow learner and they need to be more comfortable, but we need to understand that.

Then the fourth thing is training effectiveness. How effective is the training that we have? Are we effective in how we do it? Are people walking out with a process or do they also understand the why? I get this one a lot when I go in and talk to organizations. They're doing their daily stand ups or their daily scrums, or they're being agile in how they manage your portfolio, but they're doing it in name only, right? They're still doing it the old way under the hood. When you dig into it, it's still the same way, but yet they're going through the motions, right? So, how effective are we in that?

Training effectiveness can affect your adoption metrics. It may be that they're all on board and they get it, maybe your training's ineffective. It could be you got the best training in the world, maybe their heart's not with it. So, you need to take a look at all the aspects of it.

When we talk about the heart, we talk about the values, the passions, the interests, the shared beliefs. I refer to this a lot as the why. Why is it I'm working for this company? Why am I working in this job, right? So do we have passion for our company? Are our interests aligned with the culture? Do we get along or are we the lone person that doesn't get what's going on with the company and what we're trying to accomplish? It's why we enjoy our job over time.

If you find people that really get into their job and are really engaged, it's because their heart's with it, right? They're behind the mission, they're not just there for the paycheck. Yeah, the money's important. Maybe the promotion's important, maybe the title's important, but they're really there because they really enjoy what they do. Then, what are their motivation triggers in terms of their heart? Do they get motivated by money, power, authority, mastery? Are they altruistic, right, in terms of helping others? Are they mentors? What is it that really motivates them? That's where the heart comes from.

Then also, are they compatible with coworkers, right? Are you compatible with your coworkers? We can have differences in how we approach how we apply things, right, but are we really compatible with our coworkers in terms of how we get along, right, and how we communicate? So from a heart standpoint, it helps us align that.

We talk about heart metrics. Some things to consider are that as we observe them, do their behaviors change, right? So the head is taking those emotions in how we go about applying them. But in some cases, it could be that they just don't know how to apply their emotions, or we've taught them how to apply their emotions, we've helped them with that, we've given them emotional intelligence classes and difficult conversations and servant leadership, and we've put them through John Maxwell training and

whatever else is out there, right? We've buried them with disc profiles and they just don't get it, right? They just don't get it.

Are they modeling the behaviors that we want? So we can observe that. We can see how they're engaged in training and meetings. I can tell you when I conduct a workshop, I can tell you who's engaged and who isn't, just by who's paying attention, who's engaged, how they engage when they have an opportunity to contribute. Some people aren't comfortable in the whole room, in the big classroom setting, but yet when you put them in a breakout team, they start contributing right away. That person's engaged, right? They're listening, they're considering, they don't feel comfortable sharing.

So, we need to think about how engaged are people in the training and in our meetings. We need to look at their learning rates, is one way that you can see if their heart's in it. So if you have to keep putting somebody in training over and over and over again, or they just don't get it, is it cognitive? They don't have the mental skills to be able to do it? Is it the briefcase, where they don't have the ability to go in and they don't understand what to do when faced with that situation? Or is it the heart, they're just not in it?

We've all seen people that show up every day, right, they're there, they show up every day, but yet they've quit, right? They just show up, they do the minimum amount they got to do, they do their job and they leave. They don't contribute, they're not engaged, they're not working well with team members. Just leave me alone and let me do my job, right? We don't want that, especially in a change. You want to be able to identify who those people are, so you can get to the bottom of where they're at.

When we talk about heart metrics, we can also talk about their stress quotient, right? So, how stressed are they? Are they extremely stressed right now? And is that stress due to the change we're putting on them, or is the change due to their fear of losing their job? Or is it their fear of what's going on from the pandemic, for example, right? We've got to sort that out.

None of these metrics, whether we're talking about the briefcase, the head or the heart, none of these metrics are by themselves, something you should act on, they're opportunities for you to dig in and understand what's going on. Emotional intelligence and the Predictive Index are two of my favorites here, in terms of, I included those as well.

From a heart standpoint, you start getting into the mission. You start getting into, from an emotional intelligence standpoint, yes, I can teach you about emotional intelligence and we can go and we can talk about it, and your emotional intelligence score will go up, just by the fact that you attended a class with me, but are you applying it? Do you apply it as you go out when you're faced with those situations? So, emotional intelligence scores can give you some idea around that.

When we talk about, and I'm going to go down a rabbit hole here for a minute. We talk about the course in the book, crucial conversations. Crucial conversations, when you dig into it is a combination of both. It's a combination of, A, having the emotional intelligence to be able to understand when are my emotions starting to get the best of me? Then the second part of it is, how do I deal with those emotions? What do I do? What are some alternatives that I can use?

So it really helps you deal with the heart standpoint of the emotions, as well as the cognitive or the head part of it where, now that I know what's going on and I'm self-aware, how do I deal with that? So, just to give you some background, right? When we talk about crucial conversations or difficult conversations, that's really what we're talking about. So, we want to try to get to the bottom of what is going on from the heart standpoint, right, and understand that and start to get a sense.

So, when we're selecting metrics, we need to consider the type of change that we've got going on, as well as the framework. Now, I'd listed... These are all the frameworks, these are just the ones that I'm familiar with, that I like. There's a lot more out there.

We'll talk about type of change. Not all changes are created equally. Some are structural, we're going to change the way we're reorganized. Some is cultural, we want to change the way our culture works. Some are process-based, and how are we going to deliver our software? How are we going to get ideas from the back of the napkin that the CEO wrote down during one of his coffee meetings? How do we take that napkin, that idea on that napkin, and turn that into an outcome for the business that they can actually use? What's that process?

It could be performance-based. We just want people to get faster. We want to be able to do more work, it's efficiency. Then there's the hybrid, it could be a hybrid of all the above. It could be any number. When I think about agile transformations, I'm really thinking about all those. And the challenge I get a lot when I go into organizations and talk to them, is they're typically trying to fix one problem. It's a silver bullet. "It's going to improve our outcomes, from a performance standpoint. We're going to be agile. And that means that we're going to be able to change on a dime. So we want to change our processes." When in reality, to be successful and sustainable, an agile or digital transformation is really all those. We need to look at the structure. We really need to look at the culture. And so it makes it a little bit more difficult when you're talking about an agile transformation, as opposed to just a performance-based, where we just want to get more efficient.

So, you need to identify which type of change you've got, and then what kind of framework you've got. The second step you should take is develop a hypothesis statement. What do we think the outcomes are? What are the objectives we're trying to achieve, that if we increase the number of leads that our sales team gets, we believe that we're going to generate what? X amount of activity, where they get more leads, they're going to have more meetings, and out of 10 meetings, instead of just getting three actual conversations or three people that want a quote, we're going to get five, and because we get five, instead of just getting one deal, we expect them to sign two.

So, what are those hypothesis statements that we need to have? You have to have that. You can't just make a change for the sake of making a change. You can't make a change just because the CEO, or the CIO, or the CTO, or some other C-person read Wired magazine, or saw a two-minute video about how great agile or scrum was, or how you need to be a digital company now. You have to have those statements of what your outcomes are. Then you go through and you define your success criteria. I talked about the 10 meetings I have, turning in and changing from three quotes to five quotes, and that the five quotes generate two sales, as opposed to one.

You need to define what that success criteria is. You need to remember that as you're defining your objectives, perspective and context are very real thing. You need to think about that from the standpoint of it's great and wonderful to come in and go full on by the book, agile or scrum. It's great to have the idea that we are going to be a complete digital company in six months. That's great. That's a very good and a very worthwhile goal to have. Is it achievable in my context? Have we ever done anything like this in the past? So, perspective is important as you go forward. Then be smart. When I train teams, I talk about goals and we talk about user stories and we always talk about smart. So they need to be specific, measurable, actionable... I can't remember what the other two are. Testable is the last one. Reasonable and testable.

So, we need our goals to be smart. If our goals aren't smart, they're not going to be achievable. People are going to look at them and go, "There's no way you're going to achieve this. There's no way we're going to be able to do this." And they're going to lose faith, and you're going to lose credibility, and you're going to lose that T word is going to kick up, that trust word is going to start to become front and

center. Your objective of what you're trying to achieve with this initiative is going to be eroded by the fact that you're putting out goals that people don't believe are achievable, and you can't back them up. So you need to be able to start thinking about them from a smart standpoint. Is it achievable? Is it something that we can actually go through and do? Is it something that's realistic? Is it testable? Can we validate the results? Can we see the actual outcomes? So, as we go forward, be sure that your hypothesis statements and your success criteria and your goals encompass that.

You want to measure everything. And from that standpoint, go in thinking about, how do we measure what we're trying to do? What are the things we can measure? You don't want to get six months in and go, "Holy cow, we're not measuring anything here." So, you want to try to make sure that you are instrumenting everything so that you can measure it, whether it's actual number of work, actual percentage of work complete, number of stories completed, number of design documents completed, whatever it is, you need to go through and try to measure everything. T.

hen when you're talking about metrics, don't start with, "Now that we're measuring everything, we're going to go analyze everything." No. Start out with just enough metrics. Go out and pick some metrics that you think are representative of what you're trying to do, and then start analyzing those. Then consider the change management onion. Consider that we talk about the onion and the different layers of when we talk about change, we talk about the initiative, and then we start talking about the program level, and then we can start talking about the feature level on the project level, on the team level, on all of the different layers.

So, think about that when you're going forward, what are the applicable measures that we're trying to achieve that cover the level that we're at. We don't want to be measuring things like certain metrics at the high level, and by the same token, at the low level. If they don't have any influence on that team, they're not going to look at it that way. So, consider your scope of what you're trying to do. Consider that you want us to have both qualitative and quantitative. So, qualitative being, what's the quality of what we're doing? Quantitative being pure numbers, that you catch from your instrumentation, that you catch from pure activities, that you can count, that you can go through and count the - if you think about widgets - how many widgets can I count? How many check-ins can I count? How many design documents can I count? Think about it from that standpoint.

Turn your qualitative into quantitative. So, don't just ask somebody, "Hey, how do you feel about this?" and leave it an open-ended question for every single thing you're going to measure, because if you ask 10 people the same thing, you're going to get 15 different answers. Instead, give them an opportunity to be able to differentiate, but don't make it binary, yes or no. So, put it on a scale of one to end. "Do we always do this? Do we do it most of the time? Do we do it sometimes? Do we rarely do it? Or do we never do it?" So, put it on a scale of one to five, one to 10. Give them an opportunity. Give them varying degrees. When you do that, and take that approach, you can then start aggregating together and you can take that quantitative aspects that's fuzzy. You can take that and turn that into something. It doesn't have to be binary. It's not always, "Yes, we do it all the time," or, "No, we don't do it at all."

There's varying degrees there. So, try to get that, try to look for opportunities to turn that in. Then remember that binary measures, yes or no, don't give you a lot of flexibility. When I'm speaking to this aspect, what I'm really talking about is the idea of when you're asking somebody about how they feel, what's the acceptance of the digital transformation? It's yes or no? Well, that doesn't work very well. Again, going back to the scale of what we're trying to do, do they feel like it's going fairly well? Is it okay? Is it not going so well? Or does it just suck? Give them a range of answers, so you can dig a little bit deeper in terms of emotions.

Once you've talked about your metrics and you're starting to measure, be sure you set your baseline. Establish where you're at before you actually do, and start talking about the change initiative. Going

back a couple of bullet points, select both qualitative and quantitative for your baseline. Make sure that... Again, the last two bullet points are somewhat repetitive, but consider that as you're going forward with your baseline. You've got to have a baseline, because otherwise, you can't really judge where you came from. And so you want to be sure you do that early, and ideally do it before you actually start the initiative, before you actually start engaging with the team. You want to be iterative, so be iterative and incremental. So, remember that you're not going to get this right the first time. No matter how much time you plan spending on it and planning it out and laying it out and considering and learning, you're not going to get it right the first time. Let's just call it what it is.

Be iterative and incremental. So, go through, and as you're going forward, make sure that you're looking at, "Okay, here's what we're doing today. Is it working right? Have a regular cadence for when you're going to do it. Every two weeks, or every four weeks, three weeks, whatever it might be. We're going to get together and we're going to do a retrospective. Even though we're not done as a team with this particular initiative, we're going to bring everybody together. It's better to figure out that something's not working right now, and to adapt and change on it, as opposed to wait until the very end and saying, "Okay, let's do a retrospective on this." We call that the lessons learned, and in the politically incorrect days, we called it a postmortem.

We'd go through and we'd do these lessons learned, and we talk about what they are. Then what would we do? We'd ride them up in this nice document, we'd share it out with everybody, going to a SharePoint site, never to be seen again. Let's go and do something a little different. Let's change things while we have the opportunity. Let's figure out where we're at with this and make sure that we're iterating on it and adapt while we can.

Step six is get visible. Be intentional about what you do from a visibility standpoint. Be transparent. Change it up from time to time. Keep your graphs up to date. Keep your charts up to date. Keep your messaging up to date as you learn more. Be sure that you include that. Be sure that you get that out there.

You want to set a regular cadence and stick to it. So pick a timeframe. Is it going to be every two weeks? Is it going to be every...? I'm getting some glare there. Is it going to be every two weeks? Is it going to be every four weeks? Whatever it is, let's be intentional about where we stop, take a breath, and let's figure out what's working, what isn't. You're not too busy. And I hear this a lot, "I'm too busy to do that. I'm too busy to stop and figure it out and change directions." Well, how do you know you're not going down the wrong path? And it doesn't have to be a big, long blown-out all-day affair. Just spend an hour together talking about, "Okay, now is this working or not?" It is far better for you and far more efficient to spend an hour and figure out you're going down the wrong path, or to validate that we are going down the right path and we need to keep going this way.

That helps get rid of a lot of that volatility and uncertainty. We're going down the right path. Things are working. If they're not working, we're going to adapt and change. So, find a cadence and then stick to it. You want to update your metrics in near real-time. I'm not saying you need to have everything be there right away, real-time, so we can tell exactly where we're at, but be sure that you keep them up to date. When you let it, dashboards, when you let your graphs, and what have you, get out of date, then people begin to discount them. And even when you go back and update them later, what happens is they don't know when to trust them and when not to.

Again, going back to the uncertainty and the VUCA side of this. Be sure that you're updating them in real-time as is applicable. One of the things that I get a lot from leaders is, "I want to know where a team is at, that's on a two-week cadence. I want to know where they're at halfway through." Well, what do you need that for? You don't really need that. You just need that because you're scared. When I talk about real-time, what I'm talking about is, make sure that you're updating it when the cadence makes

sense. Don't make people create a status report halfway through a sprint if you're doing agile. Don't make them create a status report to say, yep, everything's going well. Don't do that. You're just wasting their time, and they're producing document that you and I both know is not valuable.

Try different delivery channels. So, try small things. Try different ways of approaching how you're going to deliver. Try email. Try Slack messages, try town halls. Try town halls with the managers, as opposed to the CEO. Try them at different times. Do small experiment. See what works. See how it, and how it all fits together. When I was at Angie's list, we did some testing where we would out with 1% of our member base. We would give them one version of the screen and let everybody else, the rest of the members, the other 99%, they would stay on their current version. If the 1% liked it and it was working, then we would gradually increase it. If it didn't work, we had only affected 1% of the population. So, try some different things, try some small experiments and see what works, and what doesn't.

From a get visible standpoint, use your digital. So, use your digital means to communicate, whether it's, again, Slack, dashboards, email, any type of social media that you use. If you're using the Yammer inside your organization, whatever you're using, use that, be digital, and get it front and center. If you're in physical environment and some of us are starting to go back to work, make sure that you're using the walls. There's lots of walls there. Make sure that you're putting stuff on your walls, and not in the back far reaches of the organization. Put it up front where people can see it walking by. If you keep it refreshed and you keep it up to date, you'll find out that people will just walk by and stop, and they'll look, and they'll ask questions, and they'll learn more. So, try to make sure that you're using that, that you're using all the media that you have available.

Then the last one is creating a suggestion box. Now, I grant you a suggestion box in today's day and age, where a lot of us were working from home, it's probably a little bit outdated, but create a virtual suggestion box, create a way where they can anonymously deliver suggestions to you, and you can gather that feedback. Most people won't give you feedback if they have to tell you their name, but yet, if they can do it anonymously, they'll do it, you might get some feedback that you wouldn't otherwise get. It's important you do that. Be open, be vulnerable about that. Figure out different ways to get those suggestions. Whether it's through retrospectives, whether it's opinions, whether it's surveys, whatever it might be, be sure that you're creating that virtual suggestion box.

As we come up on the last three minutes of the webinar, let's talk about the important takeaways here.

So remember that metrics are a balance of the head, the heart and the briefcase. We need to measure all of it. We need to measure all the aspects. I've been harping on this. I think for the last two months. Change management is really not about the organization. It's really about the people. It's really about those people that work with us; our teammates. So it's important that we think about it from their standpoint. Remember to measure everything but only to review what you need. Remember that whatever you're measuring, people will act on.

So if you're measuring something, they will begin to respond to that. So make sure, be careful about what you're measuring. You don't want to have negative outcomes or outcomes that maybe go, have unintended consequences is maybe a better way to put it. But be sure that you're measuring everything and then reviewing what you need and do it in a respectful manner.

Then again, your steps to select metrics are identify the change by framework and type, identify what your objectives are, select metrics that are important to you, based on what you identified as your objectives, your framework and your type. Capture the baseline. Review and iterate on your metrics on cadence and get visible. Make it be transparent and make sure that you are getting those out there where everybody can see them.

With that, that's all that I have for today.

Okay. Well, I've got nothing. If there are no other questions, then... Let's see if we got something else here. There's a couple in chat. Thank you for that. Good. Okay. Well, if you have any questions, if you have anything else you want to cover, either offline or whatever, feel free to reach out to me directly.

Just a quick reminder that our next SlinkyThink Session, we're going to dig a little deeper. So we've been kind of scurrying across the surface, and the only place we've really gone deep is really about the head and the heart and a briefcase. What we're going to talk about in our next SlinkyThink Session is John Kotter's Leading Change model that he's got. This is the seminal, if you will, change management approach. This is the one that a lot of people follow. It's by far one of the easier ones for people to get their head around, and it will be one that will be interesting. In subsequent workshops, we're going to talk about the ADKAR Model. We'll talk about McKinsey's 7S model and we'll move into... After that, we'll talk about Jason Little's Lean Change Management model.

Hopefully, you're getting a lot out of this, and with that, I'll let you go. Thank you very much for your time, and I hope everybody has a good day.