**Michael Danney**

Good afternoon everyone,

Thank you so much for joining us for our webinar this afternoon on “How to Successfully Deliver Your Next Transformation Initiative.”

My name is Michael Danney. I lead the transformation practice at Sense Corp.

We're a management and technology consulting firm that helps our clients implement data digital and operational transformation initiatives.

So one of the benefits of this pandemic is that we're all able to join each other virtually.

So we've got a good spread of experts across the country.

I'm coming to you from Austin Texas and really looking forward to today being a great interactive discussion with some of our experts from within the sense transformation practice.

So I'd like to introduce introduce the the four folks we've got on today.

Starting with Kim Airman who leads our strategic planning and road mapping center of excellence.

Jeff Dixon, leads our organizational change management COE.

Chelsea Waldheim, leads our experience design center of excellence and and Ben Bythewood leads up our agile COE helping our clients embrace more of an agile delivery approach and and transform in that way.

So again really glad to have all of you with us. The genesis of this discussion and this webinar was really that when we get together and talk about helping our client partner solve their hardest problems, we often find that our discussions are very I think interesting and enriching and we love sharing best practices across the different disciplines within transformation. And so we said hey why don't we open this up and make this a webinar externally. So hopefully you find some of that same value in the discussion today as we're we're talking through things.

So just to ground the conversation in terms of what we mean by transformation projects. At Sense Corp, we kind of think of these as big **T transformation projects**. So they're the ones that have implications across the organization. Not just because we're implementing new technologies or changing the systems and tools in the background but more importantly because they have **critical people and process components**.

Right no technology system is implemented in a silo. It requires process change. It may require new skills talent training. All these things that are are much easier said than done.

And in our experience, helping client partners build these out, it's often those people and process things that really make or break the success of a transformation initiative.

So that's what we're going to be talking quite a bit about today as we think about projects like modernizing your backend tech stack or leveraging artificial intelligence and advanced analytics to better serve your customers to optimize your internal operations or building out new digital and mobile capabilities. Those are the kind of things we'll be will be referencing through the conversation.

and I hope you find it interesting and valuable. So we're going to talk first about visioning and planning for transformation projects. And we will shift a bit then into implementation: How do you be successful when you're actually building and deploying? And then we'll wrap up with some discussion around adoption.

**Michael Danney’s Question**

So I want to start Kim with you. You live and breathe strategic planning, visioning, road mapping. I’d love it if you could share with us your perspective on maybe how that process has changed over the last decade as some of the technologies have changed and the way we go about it has evolved as well as any tips and tricks you may have for defining that vision and roadmap up front.

**Kim Airman**

Yeah! Absolutely. **So you know that I like to think in frameworks**. So I think about our our improvements and our evolution in a how and a what perspective. So as far as how we've delivered these strategic plans and roadmaps to our clients, we meet as this group we meet as the roadmap center of excellence and basically do look backs. We we followed our methodology, we added this new tweak, how did it go or some of our folks will bring hey I did a future state vision that looked like a candy land board, and it played. So kind of thinking through some of those creative ideas together and iteratively improving our approach.

And of course, that that includes our clients right of telling us like okay: this part this was my favorite part and then from a what perspective as you hinted of course the the world of technology is changing around us and so we really rely on the experts within Sense Corp to help us keep up and so that includes interacting with the other strategic focus areas within Sense Corp. Whether it's hey talk to me about the different cloud platforms options and how we should think through those with our clients or there's this new thing called snowflake. **Please help us understand** and so both from **setting up projects** to bring **the right people the right approach** and then as we think through executing the projects, we're using experts throughout Sense Corp to to be and stay smart about those things. And as you mentioned future state visioning, that's crucial we like to say that we spend at least 20 percent of a road mapping project on that visioning. Because it's just it's the thing that our client partners can take with them and point to. So a couple of tips and techniques there we really like to start with all of the kind of **mission, vision, five-year plan strategic plans, all of those artifacts**, that point to either here's our **secret sauce** or here are some of the **constraints** and **guardrails** to stay within as we set out this new transformation vision.

And then with those in hand, we really recommend visualizing the future state vision. So maybe that's one slide that executives can take to meetings virtual or physical and basically say this: this is how our company will interact in a more streamlined way, with more insights to drive decisions, or maybe it's kind of zooming into a specific stakeholder's point of view. But those pictures really help to drive.

The last part that I'd like to highlight which is shopping that vision to lots of stakeholders. This will kind of tee up some of Jeff's items but as as you discuss the vision with folks throughout the organization, you'll start to hear feedback. Some of it will be like, yes, great, and some of it will be, wait, i don't see myself on this picture, can you help me understand how i fit. So through the course of that, you can really refine the vision. So that the whole organization can see how they'll benefit from what's to come.

**Michael Danney**

Yeah! That is spot on **Kim,** and I want to even double down on the conversation about vision. Because when you're thinking about technology projects, it's so easy to get stuck in the the tool selection piece which technologies and the plan like show me the project plan, how we're going to get there but the truth of the matter is we're all humans. We all want to be inspired by a vision right and so **having a clear compelling vision of where we're going and that may have many steps along the way** but having that clear compelling vision and **being really thoughtful about how you communicate**, it is so critical to the success of the program because as you go through the implementation and encounter bumps and challenges along the way and the market changes. Internal things within the organization may change. It's so important to have that vision to anchor your decision-making, your prioritization.

So I think that's so well said and i think it's a good segue **Chelsea** to you. You know as we build that vision so much of it is doing the user research or customer research in some cases to understand what a compelling vision means and looks like for them.

**Question:**

So will you share with us some some thoughts and approaches on how to do that really effectively?

**Chelsea Waldheim**

Yeah! Absolutely, it's it's interesting I might start a bit backwards from vision of what commonly occurs is often times in my experience both in direct in industry building out products and platforms or many years in consulting and different engagements and engagement types it's a common challenge where we see millions of dollars being put into these these projects and products and a lot of times they come out and and you hear this isn't usable or the users don't like this or it doesn't resonate with the audience that it needs to and might not have been as successful as as we hoped. And so I love working in this team and and and bringing the vision to the forefront and how much we care around that being a central piece to success. So for me it's really around starting early and understanding your external customer or internal employee, and user needs and understanding their frictions, their expectations, and interacting with the system and not just the loudest stakeholder in the room, singing out their preference or or driving home their own personal agenda and value that they need in the business through this product or service. You know being launched and coming through and so I really am passionate on this topic and i found a recent MIT study explained it went through and calculated revenue based off of a large pool of innovation projects and there were two different different metrics they compared one was from employee led innovation initiatives and the other was from a customer inspired or customer centric innovation concept and the difference in revenue was 800 percent more revenue coming out of those that were customer-centric driven ideas. So i don't know about you guys but if we're talking about bottom line and revenue and in projects, maybe not being as successful after we've put millions of dollars into them, we really see clearly how we need to understand how we're segmenting, our customers, our audiences, our end users, and making sure we're prioritizing them, and making making them a part of the conversation and what we're delivering. So another tip on that may be say that you are going through and you've understood your customer and your audiences and how you segment them, prioritize them but it's still easy to get into we find this very commonly in our our design and iterative designer prototyping phases it's very easy to get into where we insert our own user bias, and our own assumptions where we want to design things that are delightful for us. And so it's important to have gone through understanding their needs and having those those artifacts as your north star to validate the persona's needs in what you're delivering. And then finally I think a big tip around this and seeing experience design as a large part of transformation success more and more. It's not just getting a single application or experience right and making sure that that is meeting solving the right problems for the right users and their needs but it's for transformation success. It's really an org-wide responsibility to bring the customer and end user to the conversation. So I love a story that I found from Jeff Bezos, he started something and maybe you guys on this channel are inspired to start this as well as as a new year's resolution but he started bringing in an empty chair to his executive board meetings and as they went around the horn and were talking about initiatives and updates and things that they really wanted to start he said as a rule you have to address how this impacts the customer. You need to talk to this empty chair and bring them to the conversation and they found so much success with that. They even started implementing starting at the beginning of their leadership meetings with a customer sentiment or a new piece of feedback to help them stay centered on meeting their needs and keeping them apart of the conversation even if they weren't in the room. So there's hopefully some some great tips around that. but I know also jeff we have a lot of overlap in our shared interest and working together and driving this customer-centric transformation.

**Chelsea Waldheim’s Question:**

So as you're going in kind of your initiation phase, and building out the vision for with your plan and understanding stakeholders, are there some tools or recommendations likewise that you have for understanding the change landscape and building out your overarching change plan?

**Jeff Dixon**

Oh! Absolutely, and in fact this I think the folks listening and I'll start to hear a pretty **central theme around** that which is really **understanding the perceptions of the people that are going to be impacted by the chang**e and and it starts with the work that you do in terms of personas and user stories and and understanding what that life cycle is for people through both customer and employees through that change process and as Kim was saying, you want to understand people's relationship to what that future state is and the reality is. Until you really start to understand what some of those aspirations and fears are that people have about that change, you can't possibly think about how to help them in that change, journey. So there's definitely some **structured tools** that we use to understand not only what their understanding and awareness is but what are their perceptions about the change the impending change as well as **the organization's ability** to to drive that change right because there's got to be some confidence level that your leadership and the organization as a whole is going to be able to drive that successfully and stay the course. Because as you guys know, this is no small measure when you're engaged in a transformational change. So that's really the **foundation** you know. We talk about building change plans and strategies and communication plans but all of that really start the foundation of understanding those stakeholder perceptions.

And the next piece that's great I love your statistics because the idea of voice of the customer or the user is so compelling and so to me. The other big thing is we're really trying to enroll change delegates and there's a lot of talk about change agents and and there's a lot of similarity in that but really you have to give people a meaningful and integral role in that change. Because they are creating that future that ultimately has to be fulfilled by them by the users as well as the customers. And the other key stakeholders and **there's extensive research out** in the marketplace that when you bring in those delegates despite the fact that you're involving more people, you can actually implement 40% more quickly and with sixty percent more success. It's not quite as a big a number as your 800 percent but it just goes to further emphasize that you really have to have the people that are engaged in that change. They've got to be part of that journey and and part of helping the organization decide what is it that we're going to be when we come out of the other side of this transformational change. So that's I would say and communicate profusely but you also have to do that in an informal environment i think we all think about the the formal mechanisms but it's as important if not more important in some ways to do that on an informal basis and also make sure that you're listening in a radical way to what people are telling you or else you're going to miss those perceptions. And the things that really help you build that **foundation.**

**Michael Danney**

Yeah! Jeff, as you talk through enrolling delegates and champions for change and influencing the kind of broader employee base to buy into a to a vision. You know we've done some really cool work with sense making. Our tool to help understand who those folks.

**Michael Danney’s question**

May be can you share with with those on the call today a little bit more about what that is and and and how we're using it?

**Jeff Dixon**

Yeah! So it's really a couple things. One is it is an instrument to really understand those perceptions and how those perceptions change over time but it's also a way for us to identify who are the people that are really what we call key influencers within an organization. Because at the end of the day if you're gonna galvanize this core group of people to move forward, naturally already embedded in the organization are these networks, these informal networks where people already have created those powerful relationships either because of their professional expertise or because of the fact that they're just people that folks like to go to for guidance and energy and engagement and so forth. And so we use **organizational network analysis** to basically identify who those people are and then talk about very meaningful roles. So they're clearly an opportunity for engaging them as delegates but we'll also often use them in a way to monitor what's effectively known as a transition monitoring team to sort of monitor the pulse of the organization as we're making these changes. So that we're really getting a clear view about how the people that are adopting those changes how they're responding to it and a terrific feedback mechanism for really senior leadership and the project teams to understand what the things are we need to do more or less of as well. So yeah that's that's absolutely centerpiece of what we do Michael.

**Michael Danney**

Yeah! and what's so cool about I think particularly for us is it's **data driven righ**t. So it's easy sometimes to think about the change management user adoption pieces as being a little fluffy or less perhaps less technical in nature than other components but that organizational network analysis is rooted in the data that allows us to really enroll the right folks as champions and delegates. So appreciate you sharing that and as we think about some of the great tips and perspectives shared around visioning and planning there were **two key themes** that jumped out at me that I wanted to highlight. One: Chelsea was given the example of Jeff Bezos and putting the empty chair in the room. One change we've seen in the market in the last decade is that these projects are no longer rolling up just to a CIO or just to a VP of supply chain or just a leader in finance. **To be really successful, most of them are cross-functional in nature** and they are more rooted in the customer's journey or the employees’ journey, which can challenge kind of old structures and assumptions within organizations. And so one key suggestion is as you embark on a transformation journey, make sure you've got the right executive champion and sponsor driving that project forward that oftentimes is the CEO now. It may be a chief customer officer but it's someone with a little bit more of a cross-functional approach than historically we've been used to. And the other thing as I heard Jeff and Chelsea and Kim rattling off stats about X percent improvement here and there's no silver bullet to make a transformation project absolutely successful. These things are hard. They have complex stakeholder sets, complex technologies. They take a long time. Often there's no silver bullet. So the name of the game is doing all the right things. **All the little things to increase the probability of success** on your project and and that's where each of these disciplines represented here today come to the forefront because if you're really thoughtful around the visioning, you're really thoughtful about being customer or user-centric, you're being intentional about the change management, communications, training, adoption, and you're using the right delivery approaches to de-risk that project. **If you do all those things, you're gonna have a much higher probability of success** than you otherwise would have.

**Michael Danney’s Question**

So you know **I want to kind of use that as a** segue Ben into implementation and I think it's well documented that agile is taking over as the preferred delivery model if you will. And the stats there are really clear around success or improving the probability of success and delivering better results but share with us a little bit about how we help organizations make that transition from more of a waterfall mindset to an agile organization and how do you do that without sacrificing timelines and value.

**Ben Bythewood**

Yeah! That's a that's a really good question because I think that's the crux of the matter right is that **I think a lot of organizations underestimate how big of a transition that is going from a waterfall type mindset to an agile type of mindset.**  And what I see happen a lot of times is it's kind of rushed into or it's not approached correctly on a couple of different fronts. So I'd say the first front is you know, you were just talking about executive support right. A lot of times, agile will start to be implemented either it's kind of like this grassroots thing you know. The dev team wants to do it wants to try it right but they don't really have leadership buy-in and understanding of how agile works that doesn't work very well or maybe it's implemented at the director level, but the c-suite hasn't really bought into it or no one in the c-suite has bought into it, you're gonna run into problems. Eventually if you do that because agile delivers value and promises value on a on a very different set of principles than a waterfall command-and-control style delivery model and everybody needs to understand what that is or if you're not on the same page, it's not going to work very well. So, it really needs to start with some good leadership support and some intentionality on that front but I think you hear that kind of allover and what we're all saying I think. The other thing is that a lot of organizations try to do agile all at once right and I think that applies overall to transformation too right. A lot of people I think because there's a lot of short-term pressure right as hey, we got quarterly earnings coming up right. So, we need to produce something to brief our shareholders. But that short term if that short-term pressure causes you to rush in and try to do too much all at once, you're going to set yourself up for long-term failure and that's not going to be good in the long run. So, what I would say is like especially with agile start small, make it one, maybe two teams as a pilot and make all your mistakes in the context of one or two teams. Do all your learning in the context of one or two teams and then scale from there. **And the thing is if you take the time to build a good foundation** and get it going well, you can scale exponentially. So, you can scale relatively quickly but you have to start small and make that upfront investment and do it intentionally with leadership support. And the other thing is I think you have to think about your tool set and your spaces and everything like that. I mean a lot of places are setting up agile dojos you know where they kind of have a space for their agile teams where they can all sit and work together because agile’ s big on face-to-face communication. I think they're big on it because it really enhances your team's ability to produce and to work together and communicate effectively. You know white boards and post-it notes and places where **you can visualize work, and** everybody can come in and see how things are going to kind of promote visibility.

And then alm tools application life cycle management tools like jira or azure devops a lot I've seen a lot of companies that will go out and buy that tool and say okay this is what we're using now but nobody really knows how to effectively leverage those tools because they're new and different. So you really need to take the time to understand those tools and how they're going to be used and get teams good training and a lot of times we can come in and kind of get it set up and help everybody understand. I think that kind of leads into the last piece and I don't think I'm being biased here but you really do need some outside coaching right and why is that it's because you're taking on something that requires a whole different skill set than what you're used to in the past and anytime you're taking on something you know if you think about you're taking some new step in your career right and you're doing different things, you did before you're going to try to find a mentor or someone who's doing those things as well to kind of coach you through the process. It's the same thing in an organization if you're taking on this new way of doing development. You really need someone who can come alongside you to help you understand your improvement opportunities and help encourage you when you're doing the right thing.

So, you know you are doing the right thing. I think those are kind of all the big things and in the there's a state of agile report that comes out every year. And you know the the biggest obstacles are always that come up year after year after year the lack of leadership support, cultural resistance, to the changes agile brings. And the number one thing that people say helps is agile coaching. So I’m a big advocate of it.

**Michael Danney**

Yeah and I understand that you and your team when you show up to do agile coaching. You show up with a playbook and a whistle. Is that right?

**Ben Bythewood**

**Y**eah! I like to wear a striped shirt as well the whistle. Just doesn't you whistle at people without the striped shirt on they don't know what you're doing you know.

**Michael Danney**

We got a couple questions in the QA box that I think fit in nicely with where the conversation is. One of them is around transferring the vision and plan to the teams actually implementing it. I’d say that can absolutely be a challenge that the key is I would suggest you shouldn't view those as two independent teams necessarily you need to be really thoughtful about having the right continuity from the start through implementation and adoption and no doubt you're going to have different specialists at different parts along the journey. You may have someone like Kim or her team more focused on planning and visioning in the early stages versus later but you're going to want to have that change management expertise and approach from day zero or a week before day zero of planning and visioning all the way through that user and customer centric component. Even from an agile perspective, we think about that as an execution activity but that really also has to be part of the visioning and planning to understand each unique team's ability to operate in an agile environment where there may be change or coaching needed that kind of thing.

**Michael Danney’s Question**

So try to have some commonality across the life cycle in your team and then Jeff I think a good question for you is there a risk that the OCM work can get lost by the time it reaches the teams actually making it happen.

**Jeff Dixon**

Oh! Absolutely, it's an inherent risk and that's why you've got to think beyond the sort of structured change team and the structured leadership team for a project and program. Because there's no way that we can pervasively be there and systematically carry the kind of messaging that needs to be carried. So first of all, you know research by PROSIDE, which is really kind of the big change research organization, has made it abundantly clear in terms of keeping people in that. What's in it for me? State it's really going to come from their peers and also from their immediate leader. So we really have to empower those people **with a story** and I don't mean a fictitious story but a compelling story that they keep alive and and they're going to deal with hardships. There's no question about it but those are the real conversations and we have to really equip that **group of individuals with understanding the change and understanding some of the things they're going to experience**, which isn't always you know the most pleasant part of the journey, but that has to be a constant dialogue and we've got to continue to give people **the tools and the reinforcement.** So that they can continue to carry that message. So that is an inherent risk and and that's really the job of the organizational change management team is to figure out how do we perpetuate that through all of the stakeholders in a way that it keeps it at the forefront. Good question!

**Michael Danney’s Question**

Yeah! Thank you for sharing that Jeff and and you know tying back in with agile, Ben i I’d love it if you could share your analogy around landing rockets. You wrote a blog post recently that really piqued my interest. So talk to the group a little bit more about landing rockets and and how that relates to agile.

**Ben Bythewood**

Yeah, and I think the overall point I’m making the article is that you know where I think business leaders used to you know. Think in terms of sailing a large ship across the ocean, you chart a course through a known sea, and you say this is we're going to do it. Then you keep that ship on course. Make sure it gets to its destination by controlling a number of different variables. But the argument I'm making is that times have changed, and technology is far too complex. Organizations are too complex and market changes are happening too frequently to be able to predict where that port of entry is going to be**. So, what I'm proposing in the article is that business leaders need to think more in terms of a guidance system in their business**. This goes back to that visioning piece because you have to have a vision to know what are the things that you're actually trying to affect through your transformation effort. If you know what those things are- is it customer delight. Is it better reporting and analytics if it's better reporting analytics, well in what way? is it going to help you increase Roi through better customer insights? Is going to help you run better marketing initiatives? How can you measure these things**. So measurement is the first thing you need in a guidance system.** But in order to measure, you have to know what those variables are that you're trying to affect and then set up those measurement systems. **The beautiful thing about that is once you've set up those measurement systems, you can now tie those back in as inputs to your delivery mechanism right and that's just a feedback cycle**. So you're building something or making something you're putting it into production and you're putting it into operation and then you're measuring. Is this affecting what I want it to affect in a positive way? If yes, how can I do more of it? If no, how can I fix it or change it? **The thing about feedback mechanisms is they don't work well on long cycles because the whole point of feedback is quick change.** So that's where the idea of landing a rocket comes in. It's got all sorts of sensors and mechanisms and fins and little thrusters. It's constantly measuring and rapidly measuring its environment feeding that back into all the control mechanisms. So that it can deal with uncertain variables and land on its feet as we you know we've seen it's pretty amazing to watch every time. So if you create those measurement systems, you you feed them back into to as inputs to your delivery mechanism and then you deliver in short cycles, which is an agile kind of principle to do small chunks and delivering short cycles. Well, now you've created a guidance system where you don't have to know exactly where you're going to land but you can ensure that wherever you land, you're going to land on your feet because you have the right mechanisms in place to make sure that you the outcomes that you're trying to achieve are going to be met and and it gives you room to make a lot of mistakes and to learn from those mistakes**. Then leverage that learning and then the failures to do something positive.** So that's that's where I think guidance systems are important.

**Michael Danney’s Question**

Yeah! I think that is such an effective way to think about not just agile but really transformation projects in general and how to be successful. I'm thinking about Chelsa you a little bit and Kim as well here that actually gathering that feedback iteratively. It is easier said than done. So I'd love it if you shared some tips and tricks there. Then Kim I'd love it after that if you could talk about iterative planning and what we mean by that as a plan and vision evolves. so Chelsea will start with you.

**Chelsea**

Yeah, absolutely well I think that rockets is a fun analogy at a fun Friday break from maybe some of the things that we have our minds thinking about and our daily rhythms we're at. But really what Ben is talking about is something it relates deeply to something in experience design. We see as the central part of our success which is about that alignment. If that's one word I can sum up kind of his perspective is that alignment has changed and there's more risks around it. **So feedback for us is getting that alignment is essential in.** Of course, we really like to use visuals and iterating prototypes but not only in collecting feedback. So we can adapt and produce quick changes but also aligning feedback from the beginning as well in some of our brainstorming activities. So that we are setting up for success and understanding that we're building things that are interpreting our users’ needs in the features and how we're designing those. So, one big tool we're a huge proponent of and fan of is Miro. If you guys are on this and haven't checked it out, I highly recommend you check out Miro. It's an online collaborative tool that we use with a lot of our clients, and it can be used in some of this agile planning piece but also some of the initial **brainstorming** or **design thinking exercises as you're pulling card sorting ideas** together. They also have a lot of **templates**, and we use things you know check it out. But we use it for other activities as we're organizing personas and everything. **So around getting the ideas pulled together in an online collaborative way** while we're in covid. I know Ben you also mentioned whiteboards and post-it. Like, Yes, that is our dream world. Fortunately, technology is meeting us. So, we can do that remote today, which is fantastic, but getting that alignment before we go into some of getting the development team on the ground. So that's critical. We also have I could geek out and talk about some of our design operations preferences and things of how you can use design alignment to communicate a in an iterative way along with the design system, but another big piece of feedback is not just kind of alignment going into projects but like you mentioned rapid response to feedback as you are **validating a solution** in front of users. So something else that some of you guys on this call might consider is how you're releasing your products as well. Or for us, we think of it as how we design our engagements. So you might be how you're releasing your products if you're releasing it to a smaller audience, where you can collect in a beta prototype type of fashion direct end user feedback and react and respond on that before you deliver your final product. We found a lot of success with that and have done that a handful of times. One really great success story I love is around a vehicle preference app we built for one of our our clients where we had a six-month prototyping phase and we were able to enable the the client to collect and use it to improve their operations where they needed to collect data during this time. But then also to get user feedback on how they were interacting with the system and how we could improve those features. So whether it's using a tool like mirror or thinking about how you are releasing your products, **implementing feedback** is important from the beginning to the end of all of your products or projects**. You're working on and and it's fantastic not only for that the visioning and alignment, but it can also help jumpstart that your stakeholder adoption and our stakeholder ownership and feeling like they've been a part of this process the whole time which can help with the larger picture of adoption**.

**Kim**

Yep! And from an iterative planning perspective, you can hold me accountable for every roadmap that I deliver should include iterative planning. And that's simply an acknowledgment of first: the world's going to change in this year, two years. **However, we're thinking about a transformation and we're going to learn things about how we are working together that we can incorporate**. So from the world changing around us perspective, I mean 2020 illustrates this for us. But also, just as we look back and we recommend at least quarterly. These kinds of look backs. It can be a steering committee meeting. It can be an official kind of independent review. However, it looks within your organization but basically taking a moment looking at the world around us. Has our industry changed? Has something about how we're going to market changed? Has something about our team our structure anything that we need to respond to? And then as far as how we're doing the work together, it's okay what have we learned that we do really well. What are we doing better than expected? And on the flip side of that, what are we kind of growing growing tired of that we need to think through? So Jeff and I are working through a transformation with some of our colleagues and there's just kind of some change fatigue. So, it's us looking at. Okay how can we remind folks of that vision, of what we're shooting for? **How can we kind of nurture some of the key team members and make sure that they can kind of boost morale in ways that we can**? So that that all comes from these these look backs. This kind of iterative planning. But I mean as we mentioned if you're kind of an Exxon mobile type firm, it's your independent review looking at how the project is going compared with cost of capital or other things or it can be quite a bit more informal just depending on what works for your organization.

**Michael Danney’s Question**

Yeah! I think Kim you hit on something so important there, which is change fatigue, which is real. Right? **Particularly, these larger programs, where they may span multiple years, have huge investment and major change to folks’ day-to-day lives.** And candidly, it's particularly pronounced in this virtual world that we're all living in. Right? It is hard enough rallying the troops and getting everybody in a war room and whiteboarding and you know doing all that in person and bringing in cheap bad sandwiches for lunch. All that we've at least kind of gotten used to. It's challenging doing all that via zoom. So I think another key **takeaway** is be creative as you think about your transformation. **Not just creative and innovative in your solutions but also in your approaches, the way you keep your team engaged, motivated, and inspired. The most successful transformations** don't fit into a box necessarily. Right? They grow and evolve with the organization and the team and the technologies. So I would encourage you to think about embracing that mindset as well.

**Michael Danney’s Question**

We've been getting some great questions here in the in the QA box. I want to hit a couple of them before we move on. The first one, Jeff, is for you. In some ways, it relates to to change fatigue. Pedro mentioned that they implemented a tool a year ago and it's been kind of slow going getting users to adopt it. Any any tips or tricks for improving adoption when you may have resistant business users?

**Jeff**

Yeah! There's a number and really the first goes back to when we were talking about the change delegates. So if you have people that are part of creating that solution, then they feel a sense of ownership around that, and then what we do is we work with them. Adoption is really the third step in terms of where you want to be. Because ultimately, you want them to institutionalize what it is that you've put in place. Ultimately internalize it. So, it's natural. It's second hand and so we work with our client partners to set up mechanisms for how we continue to evolve and improve on that first iteration. Right? Because it's a living breathing thing and you want to being a continuous improvement with that. So we give them mechanisms to help them to continue to steward and improve upon that that solution based on the feedback. That's coming from the users, the the customers, and so forth. One is be very intentional about how are you going to sustain that what are you giving them as a mechanism in order to sustain that and be sure that you're harnessing the the feedback and the input that's coming from the users and then acting on it. As Chelsea's saying, it's one thing to get that information but if you don't turn around and and give them an iterative prototype. Right? You know immediately after then they're going to feel like it's falling on deaf ears. So, make sure you've got a **structure** that's sanctioned by the business that becomes that governing body if you will for whatever that solution set is.

**Michael Danney’s Question**

Yeah, and Jeff I'm going to throw one more at you while you're off mute here, which is a great great question from Robert around change and transformation in the context of an acquisition. Right? His point is oftentimes acquired teams you're not as excited as the buying organization, maybe which we've all lived through that. It's a real challenge. So, any key suggestions there as we think through that kind of dynamic?

**Jeff**

Well, you want to understand the cultures as best as you can. You know there there's some artifacts that you can go look at and and try to discern what those cultures are. But really there's no suffice for. Again, kind of going in and back to that ground zero. Understanding people's perceptions about not only that imminent change but the new leadership, the new organization. What is that going to mean for the acquired party? I recommend it even if you're not working on a specific technology project. It's still a transformation. So can you put together a interdependent transition monitoring team where you've got people from the acquired organization. So that they can talk about what's the dissonance. Right. What are the things that are not clear that seem to be in countervention to one another. They really become that voice to let you know what's happening in the organization as you're making this change. Again, if you can do that with people that you've done, the hard leg work and determine who those key influencers are. They can have a very real impact in terms of of getting people on board. If you will with how we're moving forward. So it's the same mechanisms in many ways. But the change event now is obviously the coalescence of these two cultures and two organizations. There's more from an organizational design and town management piece, which is obviously a lot of what we do as well but at the fundamental level in terms of managing the change. That's a couple of things that I would do out of the blocks.

**Ben’s comment**

What a great way to make people feel valued, Jeff. Right? Seeking their input right away and making them part of solving the problem. Right? So, I think that's when the company's getting acquired. That's a big worry. Right? Are we going to matter anymore ? Is our opinion matter? Right? Are we just going to be told some new marching orders and we just have to comply? Right? So, I love that idea.

**Jeff’s follow up:**

Yeah! Well, most of the time they're acquiring the company because they have something that the acquiring company wants. So, why would you throw the baby out with the bathwater. You want that expertise and that unique point of view or culture. So you need to nurture it, not cut it off at its knees. Yeah! That’s a good point.

**Michael Danney’s Question**

Yeah, but I think you spot on the truth of the matter is in in the acquisition example. **In any of these transformation programs, that goes back to doing the little things right. That's about communication and stakeholder management.** It's things that when folks are working 80 90 100-hour weeks to make an an acquisition work and get the organizations integrated. That's the stuff. Unfortunately, that's easy to lose sight of and de-prioritize. So, I would just double back down on the the idea that being thoughtful and intentional about what does this means for our people, for our teams, for our organization. Across these types of programs really is a critical element to being successful. We talked a lot about some good tips. I think for being successful. One of the questions we got in the chat was are there any common pitfalls for transformation projects that you've seen and helped some of our client partners avoid? So, I'll open that up to the whole group any any key pitfalls you all want to call out.

**Kim**

I can start us. So, one key pitfall is while we're doing this element of transformation, let's just do lots of other things. Whether that's let's implement another set of 37 solutions. Okay? That's really exaggerating but it’s okay. While we're changing these processes, why don't we look at our entire set of processes. **This kind of goes back to Ben's point around starting agile small.** I mean it can be really tempting to try to glom on a lot of other things to transformation, but I would just caution that keep the main things “main things”.

**Ben’s follow up.**

I would say kind of building on these things that you were talking about, jeff. Is employee ownership of change? Right? A lot of times change is something that's thrust upon people from above. Right? On high and they feel a little bit powerless. The thing is change in and of itself is already scary and uncertain. We naturally resist it because we don't know what's going to happen. Right? When it's thrust upon us, it makes it even more scary and uncertain. This is a big principle in agile. Right? Is unlocking your talent through ownership of the work? Right? Ownership of the solution is like really empowering teams to solve their own problems and giving them tools to do it. I think when you say hey when it's not a leader standing and saying hey these are the changes; we’re going to make but a leader saying: we've got to make changes, Guys. I have some ideas; let's all get together and let's figure it out. What is the smartest way for us to go forward. Well, now, you're all part of the change. You're all changing and then it could become something exciting. Right? Some big things that you're all working collectively towards. That could be something that galvanizes people and you certainly see this on agile teams. they get galvanized around you know building these solutions together. It's one of the things that builds high performance teams and agiles. But I think that could scale to an entire organization if you if you really learn how to give your employees ownership of the work.

**Michael Danney’s Question**

Yeah, and there’s some great research out around the concept of psychological safety in the workplace. Right? Employees feel like they're in a safe space. There's a good book called the fearless organization that kind of speaks to this in in more detail. But that is even more pronounced in a sea of change and in a world of transformation where it's uncertain. It's different for everyone. If you're able to have teams that feel empowered and safe to think outside the box and be creative and be outspoken and collaborative, that's really when the magic happens.

**Jeff**

I'm going to misconstrue my answer to your question. So that I can make a couple points as well**. But you're asking what the common pitfalls are**. I think one of them is well wait until everything's ready and right and then we'll roll it out to the people that are going to be implementing that change. That's really a horrible way to come at it. The reason is that it's all about brain science. So, there's a ton of stuff out there but there's in the the natural response to change. Ben is suggesting what they call an amygdala hijack right. So, you immediately have all these endorphins rushing in and and you're not working from a reasoning point of view. There's great research out there about what they call the quantum Zeno effect, which is how do you counteract that. Really start getting to the reasoning and rationalizing through that change. That work is done by working on complex problems by doing visioning. It's doing all the hard work is the stuff that lets people now believe look i have some control over my destiny, I'm going to be able to work through. That's where you see you know organizations or groups that get so energized because they they have some impact on what that journey is. That's absolutely you know don't assume you're just going to turn the keys over at the end of the day. People are going to implicitly have some sense of commitment or ownership to it. That is an absolute recipe for disaster.

**Chelsea’s comment**

Yeah, and if I could add to that too. I think it's a sense of kind of both from an internal and external perspective, a lot of times we see that people miss opportunities to really celebrate the changes that are occurring and announce the iterative successes as they are coming out to pull people along the journey. So, it could be as simple as I know Kim, I'm kind of using my Kim megaphone on this one but she often shouts about encouraging your team celebrating the small wins and the successes. So, I think not done that and the pitfall flip of that could be that doing transformation work can be a long and and maybe exhausting project. So, we're challenging for somewhere from Jeff's talent management perspective. He might see that this is a stretch role for certain parts of your company or something. But really shouting and shouting those successes, celebrating those small wins as you're getting to that shared vision is a good way. But then making sure that you're bringing that to your customers and and telling them of how you're committed to the continuous improvement to meeting their needs and making sure that you're concluding that your marketing campaigns is part of your vision and externally celebrating those wins and successes.

**Ben’s comment**

What I love, sorry Michael! What I love listening to all these thoughts is what a **multi-disciplinary approach** you take to this. Because you hear us all echoing the same principles from our own perspectives. Right? It just shows that really that it's a multi-disciplinary approach to do the same kinds of things around change but in all these different aspects of your digital transformation. But it really does take that village doesn't it to get the whole picture. I think that's interesting.

**Michael Danney’s Question**

Well said, Ben. I think that in and of itself is a pearl of wisdom. So, to say. As we think about transformation journeys, it's easy to say: do I have the right technology expertise to solve x y z problem? I think we all kind of immediately think that, solve that problem. But I would suggest that as folks in this call are embarking on their own transformation journeys, they should be looking at their teams and at their partners and saying: Do I have a Kim? do I have a Ben? Do I have a Jeff? Do I have a Chelsea? Do I have the right mix? No, you can't have those four people but do I have the right mix of that talent and expertise to really you think about the right things as you're going through planning and execution and building it out? So, I couldn't agree more, and we've got about five minutes left.

I’d like to end on that concept of pearl of wisdom. Right? We've talked about different suggestions and tips. I’d open it up to the panel and ask you to share a a suggestion or pearl of wisdom that you would want to share with the group.

**Kim**

So, I can start us and it's kind of bragging about one of our clients in the form of a pearl. So, **I would recommend thoughtful engagement from executive sponsors**. So, we have an executive sponsor who didn't spend a ton of time with us but when he was with us in that 30-minute status meeting every week and some deliverable pre-reviews really engaged and gave feedback and thought critically about what we were saying and said oh: I think you've missed this group or oh really go test that idea or here's part of our history that you need to know about that. So, it wasn't a big-time commitment, but he was so engaged and steered as well. So kudos.

**Ben**

I could offer one. I think again it comes from an agile perspective but it's centered on building high performance teams because I've just seen the impact that high performance teams have. When you get solid teams of people, they don't even always have to be like the top talented people, the big movers, and shakers. Right? But you get a good solid team of people together that's committed and engaged. knows what they're doing, has the right skills and you build them into high performance team. They can move mountains and I think one of the biggest lessons that I've seen in building high performance teams is you can't be moving people in and out of teams all the time. You have to really build those teams and you have to let them sit and you have to let them build performance. I think where I see a lot of organizations especially when they're influencing agile go wrong is there they're still maintaining this matrix environment where okay well such and such is 50% on this team or 25% across four different initiatives. Well, you can't build high performance teams that way because it lacks the investment, but you get people in these teams, and I think people think like why I can't commit that person to just this one thing. You'll get more out of that person if you commit them to just one thing, guaranteed. So, build high performance teams and then one of the tricks to doing that is keeping people, the same people on the teams for longer periods of time.

**Chelsea**

I’m goanna add in a small thing I guess as well as we spent a lot of time looking at designing products and applications as well. So, it's very important to not overlook how systems interact with each other. Very small things like how things are named. Making sure that how features are communicated between and how different systems and how they integrate and the overall employee or customer experience across an ecosystem of applications is really critical can be overlooked. If you're trying to modernize a part of of a company, make sure that you're considering what are the impacts downstream or across your ecosystem of applications as well.

**Jeff**

Yeah! People remain more central to the success of your digital transformation than ever. Because at the end of the day to really make the right decisions to learn from. Machine learning I guess the best example I give is we think about AI as like the quintessential replacement and yet research shows that where you have feedback mechanisms, we're back to that feedback mechanism between machine and people. You'll get twice the return on your value for the investment. So you have to continue to lean in and make your people an integral part and they have to understand how important they are to the success of whatever that new digital environment is that you're working for.

Yeah, no doubt. Well-said, Jeff. Slow start with the internet connection but I loved where you ended and got the point across. No doubt so. You know we're right up at the hour. I just want to sincerely thank all four of you for taking the time to share your expertise and thoughts and best practices. I really enjoyed the discussion and I hope those of you who are able to join us today also got some value out of the conversation. If you have any other questions or thoughts, please don't hesitate to reach out to us. We would love to continue the conversation. So thank you very much. Thanks team.