Plan 323

Change Readiness for Anything Life Throws Your Way

Von Goodwin

Preface

Two roads diverge in a wood and I – I took the one less traveled by, and that has made all the difference.

Robert Frost

I have witnessed 25 years of clients' commitment to process improvement, and their spending millions of dollars, and countless hours of labor and worry on projects without addressing the one risk that often compromises their efforts: The core values of the staff.

Vendors, consultants, professional coaches, and others that were contracted by businesses to provide a variety of goods and services toiled over details, milestones and dependencies only to find the staff was not ready for change; not to mention learning new software, workflows, or services. Those same vendors, consultants, and professional coaches often found it in their best interest to omit the risk of change readiness from their discussions with their clients and the reason is this: Each was ill-equipped to deal with the problem. So the service providers sold what they knew which is their product or service, and their delivery methods.

The reason for this writing is to give a broad-based perspective of my experience as a trainer, consultant and voyeur of service vendor implementation tactics and strategies. It is an honest and candid perspective of my mistakes, revelations and accomplishments. It serves also as a primer for professional services I offer with regard to Change Readiness. As you soon will read, I took the road less traveled. I took on the task of getting to the heart of the matter, so to speak, and work with how staffers think and feel about ethics and morals; and about their responsibility to those that employ them. I know this may sound a bit preachy and maybe a bit outside the boundaries of modern-day tactics, and that is exactly my point!

Technology advancements are generally good, and worth the expense. New ways of approaching tired, old process management is often beneficial, and worth the effort. But there are times when getting back-to-the-basics is necessary to coalesce the hearts and minds of perhaps the most costly aspect of your business, your staff.

Without this coming together of the hearts and minds of your staff, the efforts of the service vendors and management are short-lived. My experiences have shown me that the effectiveness of trainers and consultants wanes dramatically after their physical departure from each client's site. And without exceptional efforts by key staff members, corrective actions are needed as soon as 6 months later; unless one objective is accomplished for each staff member.

This book promotes the intrinsic value of that single objective and provides a general outline as to how to achieve that goal. What is omitted are the hundreds of accounts of real success and transformed lives. Also limited in this book are the dozens of techniques that were employed in those transformations. What is clearly stated in this writing is the need to focus on what **not** is to be learned, but rather what must be **remembered**: The answer lies within each of us and has been there all along!

Introduction

Insanity is doing the same thing over and over again expecting different results.

Albert Einstein

Motivation: The one characteristic that is as American as baseball. It pushes the athlete to win, it provides the impetus for the soldier to take the hill, it causes the mother to endure pain to birth a baby, and it provides the drive to achieve one's goals. The source of motivation is without consequence. Whether it comes from fear of failure or loss, or from a desire for gain or betterment, the big M is taught, or better yet expected in each of us from cradle to grave. Family and friends expect a level of motivation as does employers and clergy, and we are all guilty of wishing, praying, and searching for the elixir that would make us the next Donald Trump, or at least attractive, desirable, or employable. And frankly, those that don't display a specific level of motivation are characterized as slackers, slow witted or worse – contrarians such as me.

Here is the kick in the head; motivation does not work for the long term for anything we attempt to do. Motivation works when it does work for the short term. From one confessional to the next, from one relationship to the next, from one weight loss program to another, or from one candid discussion with your boss to the next, motivation is like a drug – an elixir – that calms the knots in one's stomach with the ups and the downs of the thrill ride called Change.

So, if motivation does not work for the long term, what does? How do those we recognize as successful whether it is a seemingly impossible business that defies all odds that makes it, an enduring 60 year marriage, or, an incredible change in lifestyle, do it? Is it luck? Is it fate? Is it they had better opportunity? There is something other than motivation that comes into play. And that secret will be revealed later. But for now, we must first define what motivation is, and what it is not.

To begin, motivation is someone else's idea for you. It is external expectations for what others think you need, want, or desire. And those that are truly successful from your perspective that display various motivation tricks have another component that is ultimately the only component that is the impetus of their fortune; something deeper and lasting, and yes that will be revealed later. As for now, let's explain how motivation is used and see if you can recognize the pitfalls.

It Was Magic

Preacher man talking on TV, puttin' down the rock and roll

Wants me to send a donation, 'cause he's worried about my soul

He said, "Jesus walked on the water.", and I know that it's true

But sometimes I think that preacher man, would like to do a little walkin' too.

Charlie Daniels

I have been a consultant for over 25 years. Having worked with well over 600 clients, my experience has been that of a card-carrying member of this-is-how-you-do-it fraternity of know-it-alls. That is far too many hyphens, but most of you will understand what I mean. I was the suit! Early in my experience I memorized the narratives of what I was supposed to say in one setting, or another. And I used statistics to lend credibility to what I was espousing. Believe-ability and credibility were my epaulets, badges of honor, and I injected corny jokes when I thought it was clever to do so. I read soap opera digest to connect with the ladies about All My Children. I role-played using canned exercises with colleagues to hone my skills; I quickly became a go-to person to make the unhappy clients happy.

My role in the context of this writing was that of a *fixer* of that which was broken: Making unhappy clients happy. Medical practices would be persuaded by my employer to purchase software and with that a package deal which included training and helpdesk support. A typical post-sale experience for a new client would be a kick-off call to layout the implementation plans. Dates and objectives would be discussed and decided, and expectations as to which side would be responsible for any given milestone would be assigned. It is safe to say there are many contingencies that had to be addressed to have a successful implementation. And for the most part, the major items seemed to get done. But there were always times with each client whereby deliverables would fall through the cracks. And it was those deliverables that 'fell through the cracks' that were my responsibility to correct; and each client – ALL clients – had training, workflow and coaching needs. I did not work with all of the clients because at my level it was an added cost for my services. So, at risk of putting the cart before the horse, those that did not secure my services were the ones in most need of fixing.

Those most in need of *fixing* that required over 90% of my time and efforts centered on the retraining of the software to the staff of each client. Unsurprisingly to me, it was a shock to the client that their staff members were ill prepared to utilize the software at go-live. Those assignments escalated when the controversial decision was made by my company to streamline training by making it an online requirement with inexperienced trainers reading from scripts. In fairness, it was becoming an issue of a resource-management concern to have enough available trainers to service an increased number of clients; that raised the questions of scalability. Nonetheless, discussions between the company and the client regarding staff training were limited to class schedules and staff availability. There were never any discussions to my knowledge with any client regarding prepping the staff for the transition: That is to say, the need for any coaching as to how one manages anxiety, increased expectations or simple fear. The advice given by the project managers was: We do this all of the time, things will be fine!

Well, things were not fine. Most clients were dissatisfied with some aspect of the process, and it reflected often in complaints by the staffers from top to bottom. The complaints were grouped into two categories: One, I am not equipped to do my job, or, two, the software lacks features or is too difficult to do my job efficiently. Hardware and technical situations were easily resolved; pull a cable or buy a piece of equipment and it is done. The human aspect was altogether different. And that would set the stage for my interaction with the client.

Arriving onsite at a client's office I had the effect of elevating everyone's consciousness and performance by simply being there. I know it sounds foolish. It was magic. I felt chosen! Early on, my ego was certainly affected by the reactions of my clients. I soon learned, however, the reality of this phenomenon and a bit of humility set in and I began to notice human nature more closely. The excitement of an outsider coming in always created some degree of fear and uncertainty. Everyone's senses heightened as each was conscious of putting their best foot forward; I referred to it as the time when everyone's face was washed and their hair combed. But when I would break the ice and close the gaps between the *outsider* and the staff with tales of my travels, their guards would lower and each would relax. I was good at that and I do take a degree of pleasure to this day for those achievements.

When the staff at a client site did relax each would recognize my presence as an opportunity to deviate from the norm: This was party time. Some aberrations were non-work related such as catered lunches, drinks after work, and a more relaxed protocol. This deviation would also open gateways to instruction and understanding that quite simply did not exist in a normal day-to-day grind in a production environment: This was innovation time. Each staffer would at some level exhibit managerial characteristics such as looking at efficiencies, processes and outcomes. It was interesting to observe a nurse suddenly become interested in cash collections, or a manager for the first time, in a long time, listen to the ideas of a file clerk. I loved it. Management would often comment how adept I was at getting information from the staff and *motivating* them to learn. I was miraculous; did my presence did all of that?

My assignments were a workweek in duration. As my arrival created a bit of fear, my departure created a lot of anxiety. Early on I dismissed this as a rationalization that Mr. Wikipedia was leaving the building and with him their access to a library of knowledge. As I mentioned earlier, humility did set in and my departure was far more than an information resource departing, I provided an opportunity for them to exist more meaningfully in their world and with my departure their inner spark and license to contribute was leaving. I soon learned that it was less of what I knew and more of what I turned on inside them was what would be missed.

My exit interview with management always provided a detailed recap of the week and my assessment for the requirements of the business moving forward. What did not register with me initially was the topic of my return which was always discussed as a planning item. Usually, my efforts which included training, monitoring and motivating had a shelf life of about 6 months. That's right. Short termed. The question was never asked why it was short lived, I simply pre-handled the objection by giving management an out – that is; people are people and people backslide and the information becomes diluted as individual interpretation happens. And I would profess there's no way around it. And as you might guess, I made a good living with repeat trips to the same client.

I know this may sound disingenuous, but at the time I truly believed this was the way it was. If one were to take a short-sighted, calloused view of the each client scenario as it played out, one could make the assessment most people simply don't care. How can staffers – responsible people – not take things more

seriously? Is there precedent for this in life and living? One lives life from one confessional to next, from one Sunday to the next, or one revival to the next in an attempt to be righteous. One lives from one paycheck to the next, from one weekend to the next, or from one vacation to next in an attempt to be like everyone they know. There are many examples. Nonetheless, the topic of permanence never was discussed until I later changed my approach. Even so, at that time that was the plan. My employers accepted it, my clients were comforted by it, and I profited by it.

So, from one visit to the next, the plans I developed would be put in place and were implemented by others, notably senior management. The training I had provided was to be utilized by mid-level staffers to play their role to assure integrity of workflows and outcomes. The benchmarks and monitoring tools that were established were to be a collaborative effort of many staffers to encourage teamwork and stay the course. The duration of the effects of my efforts in the beginning of my consulting visits could be calculated with an egg timer. That troubled me. If I were doing a good work worthy of recognition then the durability of my efforts would have to be an embarrassment. I was gone. And 'I' could have been any consultant with a similar approach. The newness of all that was done and experienced faded and things returned to normal: Normal as in pre-visit normal, reverting to old patterns, outcomes and frustrations.

There were times when momentum carried on a bit longer. This was achieved because of the presence of gifted management. Sometimes something inside a manager would click and an increased enthusiasm for the new plans would be the energy of sustaining the mission. After all, was I to believe I was the only gifted consultant? Once again, humility found its way to my heart quickly. Nonetheless, those managers that maintained several weeks did so because the vision of what was to be accomplished resonated with each of them. They possessed the secret component discussed earlier that will be explained later. Their problem was igniting that same spark in the staff. That is always the problem. Each manager established and maintained a protocol – policies and procedures - that would mandate adherence to a workflow and outcomes. They would almost always revert, however, to what they were accustomed.   Motivation had its place when things were new and exciting for everyone. It waned later for most and those that kept it did so because of the inner spark. Fatigue can make cowards of us all!

Few clients maintained their enthusiasm for an extended period. By period I mean more than a few months. Those that did had a champion in the ranks that would carry the torch for others to follow. These staffers bought into what was being proposed by management and me. These individuals were special; there was something inside them that found work to be gratifying. And at their level, embedded in the rank and file of the production staff, these individuals had the opportunities to affect change that management did not have; and those opportunities was peer pressure.

At the level of peer pressure vocabulary, emotions and sanctions have few boundaries. Protocol restrictions are lessened when things are said, done, and enforced at this level. In fact, bringing motivation closer and closer to where one lives strengthens the effort. I like to use the example of rocks. A rock that is formed at the heat and pressure in which it currently exist will be stable and hold together for a long, long time; meaning it will not fall apart because it is at home. A rock taken from its place of forming and exposed to conditions for which it is not well suited will fall apart. So, the further down the ladder, so to speak, the greater the adherence to an objective can be passed by a believer, the better it is for the business.

But what about the person?

It's the Person

There two great days in a person's life…

The day we are born, and the day we discover why.

William Barclay

I observed the effects of my work on hundreds of clients. In the beginning, I felt successful making it through an assignment by covering my list of objectives. Then a funny thing happen, I had a road-to-Damascus experience. Dramatics is not the intent here; my use of that wording is to emphasize the impact of my epiphany. The Apostle Paul was stricken blind for a period of time so that he could eventually see more clearly. I am not Paul, but I do believe we have incidents in our lives that help us to see clearly. In fact, I have come to learn that thinking clearly has infinitely more value than thinking deeply. Seemingly overnight I was made aware that it is not the software training, or the workflow construction, or the benchmarking that was important, it was the people. I know what you may be thinking; something to the affect we all know that. But what I mean is much deeper.

The clients that had a staffer that completely bought into my consulting work were those that could internalize things. I don't mean memorizing, nor do I mean being bull-headed enough to will their way through day after day of adherence to policies and procedures. I mean they felt it, and thereby lived it. What happened inside these people that didn't happen in the others? I know people are different, but there are far more similarities than differences. It was the answer to this question that pushed me over the edge of reason to realization.

After this epiphany I changed the way I approached my assignments. In fact, although my effectiveness for my clients increased profoundly by many tangible measures such as bottom-line profitability and staff retention, my employer and supervisor became less enchanted. The reason was this: Working for a software company and not promoting the software as the ultimate solution to all of the client's problems was troublesome. My supervisor wanted software solutions to what I considered spiritual problems. My rationale was this; if the software is the ultimate answer to all of the questions then personal responsibility can never be identified as recourse. That is, the software company had better have a solution to any, and all, problems a client may have and those features did not exist. I knew that would not hold water in my supervisor's cup, but I knew I was on the right track.

So, the question in my mind was this: How do you *motivate* a staffer to be a champion. Reflecting on my experience, all was well when I was present. When I observed, creation happened. This observe / create idea has its roots in ancient traditions, as well as modern-day physics. Things not only happen when one watches, but the things that happen are what one expects. Faithfulness to the objective waned over time after my departure; the observation and expectations of those that were to maintain the mission changed and things happened accordingly. Some clients did better than others in longevity to the cause. And the only characteristic of the clients that were successful for a longer period of time was the presence of a champion at the rank and file level. This champion(s) would have a demeanor about them that was not authoritarian in nature, they were not bossy; it was more of a characteristic of being connected. And it was that 'connected' characteristic that intrigued me; connected to what? How does one spot a champion? How does one become a champion? Is learning to become a champion possible? Rarely were the champions in a

supervisory role. In fact, those that were champions would not be considered the smartest in the room; they were certainly more intuitive whether they would admit it, or not. I started to pay closer attention to this anomaly.

I was 3 years into my experience when I began to amend my approach to training and consulting. Whether it was a one-on-one scenario or a small group setting, I took time to get to know each individual. This took a lot of time and I was chastised by management of both the client and my employer for not sticking to an out-of-the-gate approach to training; it was supposed to be all about the software. I was assigned a practice in South Dakota to work with the patient registration staff to develop a more fluid process of checking in patients and to coach techniques to reduce billing errors. The front desk supervisor was an older lady that was completely intimidated by computers, software and change. I found her teary-eyed at her desk prior to patients arriving for their appointments. The fork in the road in her mind was whether to stay or quit. I told her I would help her with either, but before I allowed her to continue with her decision I asked her a question. Looking at her desk I saw 2 small children in a framed picture. I asked her to tell me about the children and 2 hours later I knew not only of them but also her husband, church, civic activities; I heard it all. Near the end of the discussion I asked her one final question. The question was, "How important is it to you for those grandchildren to remember you as someone who would not quit?" I am sure you know what happened next. She calmed herself and allowed me to help her develop a routine that she could replicate and train.

I worked in all areas of that South Dakota practice, approaching each staffer in a similar manner. I found what some would call their *button*. I find the term *button* a bit sophomoric. I was not really in control as much as I was allowing each to be an expert; an expert in what they know best: Themselves! It was something deeper than button pushing, I felt it. I learned that if the question were asked to have the individual define who they are, or what they do, most could not articulate a summary statement: The responses fell into 2 categories; what they were not, or to marginalize what they did! I worked with each of the staffers to construct a personal mission statement that defined what's important about them and what they could contribute. It is safe to say, I did not cover all of my software objectives that week because of the time that was spent getting to know the people. I never returned to that business; and repeat business was a cash cow for me. I called from time to time to check in and what I discovered is that software knowledge notwithstanding, this was a collective group of individual champions. They learned to improvise because felt emboldened to do so.

Still reflecting on my experience, I was having great success developing the rank and file, even though I did not yet have a full understanding as to why. But, I was concerned that focusing on the rank and file spread my efforts thinly because of simple logistics: So many people and so little time. I had many customers to satisfy; my employer, my business client, individual staffers, co-workers, anyone with which I had contact I felt responsible. If I wanted to completely *fix* a client I would have to develop managers with my style and approach to coaching and training. I chose managers because of their license to affect change and my challenge was to give them the courage and insight. And I first had to figure out what that style and approach was and how to replicate it.

Candidly, that objective stumped me for a while – a couple of years, in fact. What had been my experience to this point could be summarized by this: I started my career by training an agenda, hoping my students could make personal sense of the information I was giving. Then training evolved into customizing the information to fit the person. The former is easy, less effective and short termed. The latter is more

difficult, more effective and longer termed. In fact, the strategy had an additional layer beyond the student making sense of the information, or customizing the information to fit the student; the natural evolution was to truly affect the person so that without regard to how information was received, it would be meaningful.

What was I tapping into when I made it personal? Is it as easy as making friends with the staffer? If that's the case perhaps one could simply buy that commitment with incentives. I learned along the way to live one's questions. That is having faith in revelations, divine or otherwise. I also learned that there is no such a thing as coincidence; things happen with purpose. I also learned patience, as well. Patience in that things will come to you when you are ready to use them: The teacher will arrive when the student is ready! But the greatest thing I learned was the power of gratitude.

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