CAKE & ARROW

A Transformation from Within

A Step-by-Step Guide for Insurance and Financial Services Organizations to Transforming Digital Culture and Becoming Truly Customer Focused

By Christina Goldschmidt & Emily Smith

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What does it take to become *truly* customer focused?

Executive Summary

In 1999, B. Joseph Pine and James H. Gilmore published their now pivotal book, *The Experience Economy*, arguing that products and services are not the only goods to be bought and sold, but that experiences themselves have real economic value. Consumers, they believed, were not only willing to pay for experiences, but would soon begin demanding them. The big winners of the 21st century would be the brands able and willing to capitalize on them.

In the nearly 20 years since it was first published, the book has become gospel for many of the millennium's most successful brands, and, seemingly overnight, managed to invent the field of what we now call Customer Experience (CX).

A quick look around and you won't be lacking in examples of how the concept of experience-as-commodity has infused nearly every industry, driving what we now call digital transformation. Airbnb has transformed the travel and hospitality industry. Uber has fundamentally altered how we move around cities. Netflix has changed the way we watch television and movies. And after Amazon, retail will never be the same. These brands have proved Pine and Gilmore's thesis, illustrating how, in the 21st century, it's experience that sells. And, as of 2016 we now know that companies that offer consistently best-in-class customer experiences tend to grow faster and more profitably. (Catlin, Duncan, Fanderl, Lorenz 2016)

Companies that offer consistently best-in-class customer experiences tend to grow faster and more profitably.

Growth

Annual Premium Growth 2010 - 2014, %

CUSTOMER EXPERIENCE LEADERS	6%
CUSTOMER EXPERIENCE LAGGARDS	3%

- Increase in customer loyalty (80% more likely to retain customers)
- Higher success rate for cross-selling activity
- Benefit from positive referrals

Costs

Average Expense Ratio 2010 - 2014, %

CUSTOMER EXPERIENCE LEADERS	24%
CUSTOMER EXPERIENCE LAGGARDS	26%

- Increase in once-and-done processes / solutions
- Reduction in call center volume through better customer guidance
- Less marketing spend necessary to drive growth

EMPLOYEE SATISFACTION

Caitlin, Duncan, Fanderl, Lorenz (2016)

01. Weak Digital Culture impedes the ability to understand customers

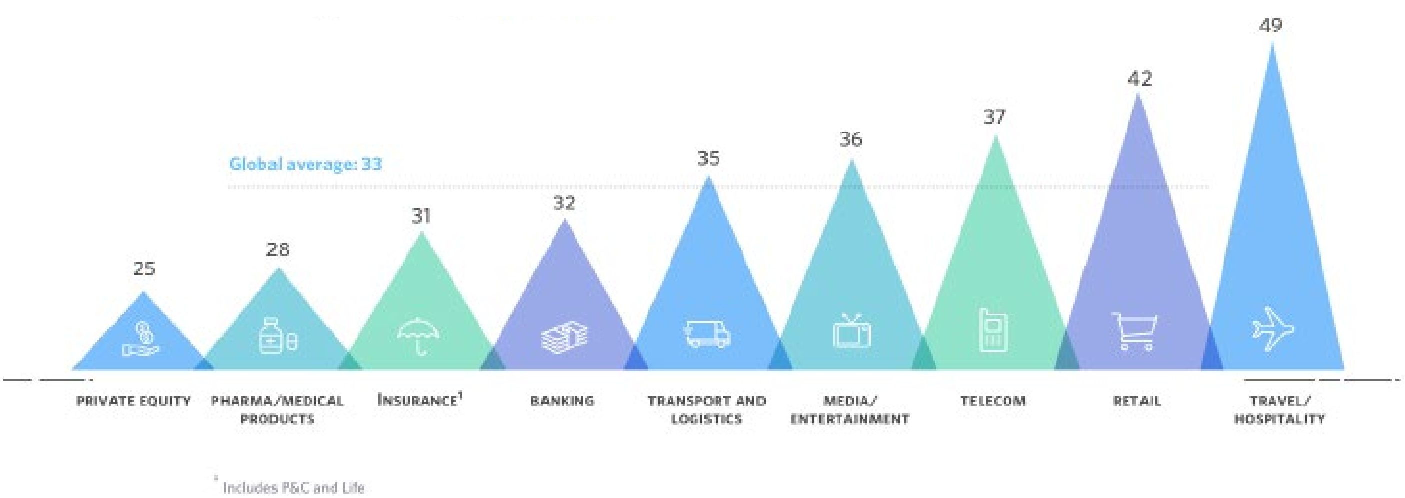
But when we talk about experiences, what we are really talking about is a renewed focus on the customer. Brands competing on experience are those who truly understand their customers, and in doing so, are able to build experiences around customer journeys, tapping into their customers' needs and desires. For this reason, focusing on Customer Experience is a win-win for brands and customers alike. By giving customers exactly what they want, brands are able to gain loyalty and, of course, grow their businesses.

Understanding what customers need and desire, however, is easier said than done, especially in more entrenched and regulated industries where legacy companies are beleaguered by complex regulatory requirements and a culture of "business as usual." These limitations explain, in part, why certain industries have been slower to adapt. According to a McKinsey report from last year about the imperative for insurance companies to focus on Customer Experience:

"The main reason so many companies fail to improve customer journeys is that understanding what customers value is not an easy task. Identifying what drives customer satisfaction and translating it into operational performance improvements requires deep customer insights, solid analytics, and modeling the most important customer journeys, with cross-functional ownership and multichannel, end-to-end management." (Catlin, Duncan, Fanderl, Lorenz 2016)

Not surprisingly, McKinsey's Digital Quotient–a metric designed to evaluate 18 management practices connected to growth and total returns to shareholders–places several industries, including banking, insurance, and private equity below the global average when it comes to their ability to effectively transform and deliver on Customer Experience.

Distribution of Digital Quotient® score by industry, globally.



McKinsey, Digital Quotient (2016)

According to the same study, a "weak Digital Culture" is to blame for the slow transformation. But what exactly is a "Digital Culture?" McKinsey defines it using 5 key attributes:

- *An appetite for risk*
- *A test-and-learn approach to product and service development*
- *Agility*
- *Willingness to collaborate internally*
- *Willingness to collaborate externally*

While most P&C insurers are held back by their "weak Digital Culture," the top P&C insurers not only rank high in these areas, but are increasing revenue 1.5 times as fast as the rest of the field.

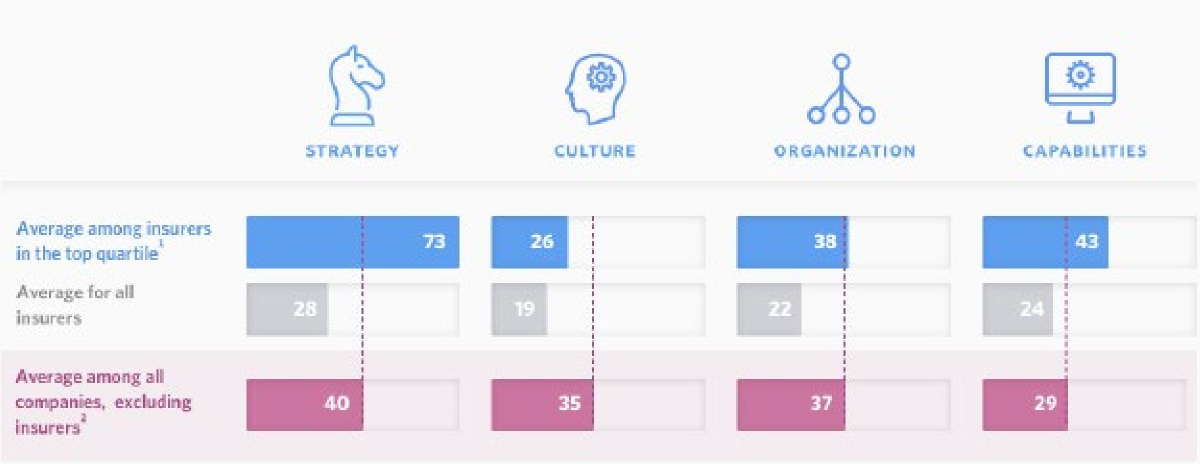
> P&C insurers with strong Digital Cultures are increasing revenue 1.5 times as fast as the rest of the field.
>
> *McKinsey, Digital Quotient (2016)*

02. Culture and Organization as key areas for growth

Among the areas important to an organization's digital transformation are culture and organization. When it comes to culture, the most successful companies "have a greater risk appetite for digital initiatives, embrace a test-and-learn mindset, enforce cross-disciplinary collaboration, and look outward for inspiration." And when it comes to organization, companies with "high-quality governance and employee practices" and those who effectively align roles and responsibilities tend to outperform their peers. Both are areas where all companies–and P&C insurers in particular, as the graphic below suggests–struggle, greatly impeding their ability to become more customer focused, and thus to grow faster and more profitably.

P&C insurer' performance scores in the five attributes important to Digital Culture

Points out of 100 for P&C insurers in each of four areas



1 Sample of some 30 insurance companies worldwide.
2 Sample of 200+ companies drawn from range of US-based, non-insurance industries.

Mckinsey, Digital Quotient (2016)

03. Agency and talent acquisition is an incomplete path to digital transformation

Some of the more beleaguered industries with low Digital Quotients, like insurance and financial services, have long recognized the need for transformation. In the past decade, among other steps toward change, we have seen the massive trend of in-housing UX talent alongside the acquisitions of UX agencies by corporations, the most talked about being the Capital One acquisition of Adaptive Path.

Similarly, the business consultancy Accenture, in a continuing effort to compete on the Customer Experience battleground, has been on a buying spree, acquiring 12 digital agencies since 2013, including two Sidney-based agencies, the Monkeys and Maud, in May of this year alone.

And while acquisition can certainly be a path toward the organizational change needed for companies to become truly customer focused, the transformation often happens in the wrong direction, with corporate culture infusing creative agencies rather than the other way around.

For example, when Accenture acquired the ecommerce agency, Reactive, a large number of Reactive's employees left the company, because, according to AdNews, "they couldn't align their values with the new organization. It is said to have gone from a nimble, small agency startup with a dynamic culture to a cog in a corporate wheel that smothered it."

FJORD's transition to becoming a part of Accenture appears to have had speed bumps of its own. It's Glass Door page is replete with references to the difficult transition. One employee's comment reads:

"The relationship results in a sort of 'two-headedness'–working style, culture, types of projects, desires/demands can sometimes be in conflict with Accenture and FJORD."

Another employee's advice to management reads:

"You have an awesome in-studio team, which I'm afraid if Accenture continues to interfere with the work you guys are doing, that several of your most talented folks will abandon ship. Do everything you can to separate the Accenture workflows from the Fjord workflows. If Accenture wants to work on a Fjord project, have them learn the Fjord way."

And while a few employees' voices on GlassDoor give us a very incomplete picture of what the relationship between FJORD and Accenture is really like, avoiding this kind of two-headedness can prove difficult, especially at large organizations deeply entrenched in old ways of doing things. Furthermore, as the McKinsey research suggests, transforming your organization to be more customer focused requires more than just the right talent, it requires cultural and organizational change.

> 68% of life insurers say internal company structure or cultural constraints are the key challenge they face in delivering their digital strategy.

EY, Insurance in a digital world (2013)

Recognizing that UX and creative agencies hold the key to delivering on Customer Experience is definitely a step in the right direction, and has surely contributed to some of the major transformation we have seen over the past decade in financial services with what has come to be called Fintech. But many companies, particularly those within the insurance space, continue to struggle to transform. And while 68% of life insurers believe that company Culture and Organization are the key barriers to improving their Digital Culture (EY, 2013), KPMG's 2016 Insurance CEO Outlook report found that most CEOs are still looking to talent and acquisition to solve their digital strategy woes, with very few investing in the organizational transformation and agile design practices required to enhance their Digital Culture, as depicted in the graph below.

What is your organization doing to accelerate the execution of your strategy?

KPMG, Insurance Outlook report (2016)

04. Going beyond talent to transform Digital Culture

In order to innovate and become truly customer focused, insurance companies need to develop an internal culture of understanding and designing to customer needs. But that sort of change doesn't just happen overnight, and it doesn't happen automatically when you hire a new CIO or acquire a digital agency. So where should insurance companies start? How can they seed this change and make sure it sticks?

This white paper presents an innovative learning model we designed to facilitate transformational change within insurance and financial services organizations. Our model is based upon more than 10 years of working within these types of organizations to teach design thinking techniques, conduct design studios, and empower organizations to use these methods to institute the cultural and organizational change needed to build these capabilities internally and develop a Digital Culture that is truly customer-centric.

In combination with our agency experience working with insurance and financial services companies like MetLife, Prosight Specialty Insurance, and Citigroup to design and launch new and innovative products, we also hold internal expertise in adult learning; members of our team are regularly invited to guest lecture and teach design thinking workshops to MBA students and other business professionals, hold positions on design thinking advisory boards at prestigious universities, and speak at conferences on the use of these practices within the insurance and financial services space. Not only does this white paper detail best use of such practices, but sets out a model for internal adoption and scalability.

How do companies seed the kind of change that transforms their organizations?

The Learning Model

Effective change starts small and then grows inside an organization authentically. Authentically, however, does not mean automatically. In order for transformation to take foot, organizations must be thoughtful and intentional about how they go about instituting change.

GOAL

To enhance the Digital Culture at insurance and financial services organizations by infusing the organization with a spirit of innovation, design thinking, and customer-centricity by implementing a participatory learning model. Using McKinsey's 5 attributes of Digital Culture, our learning model aims to:

- *Increase the organization's appetite for risk*
- *Improve agility within the organization, ie. their ability to change midstream and execute changes quickly*
- *Institute a test-and-learn approach to product and service development across the organization*
- *Improve the organization's willingness to collaborate internally and externally*

METHODS

Our learning model makes use of proven methodologies and approaches from across the fields of service design, user experience, design thinking, and business administration.

** For a complete description of methods, please see section 6 of this white paper, Glossary of Methods*

Design Thinking Methods

- *Systematic Brainstorming Techniques*
- *Affinity Mapping*
- *Design Studio*

User Experience Methods

- *User Research and Testing*
- *User Insights*
- *Information Architecture*
- *Personas*

Service Design Methods

- *User Journey Workshops*
- *Persona Role Playing and Improv*
- *Sensory Brainstorming*

Facilitation

- *Stakeholder Management*
- *Customer Feedback Gathering*
- *Cross-functional Team Facilitation*
- *Business Model Validation*
- *Lecture*
- *Coaching*

MEASUREMENT OF SUCCESS: RUBRIC

The success of an organization's digital transformation can be difficult to measure, as it is always ongoing and the definition of what constitutes a strong Digital Culture will inevitably change as society shifts and customer expecations and technology evolve. Our success rubric is based upon McKinsey's 5 attributes of Digital Culture and can be used as both a baseline, to guage where an organization is currently at, and as a means of assessing progreess as an organization undertakes our learning model.

Criteria

	5	4	3	2	1	Score
APPETITE FOR RISK	A culture of distribution-method disruption.	A culture of failing fast and learning from past bets.	A separate innovation organization exists.	External consultants deliver programs for rapid growth and innovation.	Teams protect revenue from existing sources at all costs and have a fear of failure.	
AGILITY	An organization that is highly functional though strategically flexible.	Scale investments for automation, machine learning and marketing technology that free teams to pursue innovation.	Adoption of lean/agile/ sprint approach and growing the ability to manage change.	Mavericks, with executive support, deliver innovative programs with outside resources.	A culture of compliance reinforced by operational investments.	
TEST & LEARN APPROACH	Institutionalized experimentation.	Mechanisms exist for regular tracking of customer feedback and input. Teams emphasize testing hypotheses and optimization strategies.	Documented procedures for test and learn.	Poorly executed experimentation methods.	Ideas are generated by internal teams without any customer input. Launches are big and singular with a one-and-done attitude.	
WILLING TO COLLABORATE INTERNALLY	Complex teams that easily share resources, knowledge and goals to meet any deadline.	Cross-functional teams meet regularly for design thinking workshops. Team members have the ability to trade functional roles on projects when needed.	Leadership support for collaborative team formation and structure.	Teams regularly disintegrate into nonproductive conflict or stalemate.	Team members are completely slowed.	
WILLING TO COLLABORATE EXTERNALLY	Communities inclusive of external partners.	Teams meet regularly with external partners via an established method like a panel.	Development of relationships with external partners.	Executive support for external input.	No evidence of partner or customer feedback mechanisms.	
					TOTAL	

LEARNING THEORY: ANDRAGOGY

It is critical to develop a successful learning and training function if new cultural and organizational practices are to take hold and ultimately, be owned and taught by and within the organization. Our learning model makes use of several key learning theories.

Leveraging Malcolm Knowles's widely known theory of adult learning, **andragogy**, we can form a basis of effective training. Moreover, taking into account different learning styles, we can make sure that learning is easy for all types of learners.

There are seven key principles for designing adult learning:

Learning Theory: Andragogy

Source: Knowles, 1970

We incorporated the principles of andragogy into our model design to ensure that user centered design and design thinking skills are fully utilized by the adult learners:

Autonomous: Self-driven and adaptable

- Learners have a desire to succeed in their internships and secure a full-time offer. Providing context of how these skills will help them be more innovative, faster, will provide internal motivation to learn these techniques.
- Providing a guide for learners to follow allows them to direct their own learning. We provided a check-list of skills, steps and milestones for them to follow through the course.

Grounded: Leverages existing knowledge and experience

- Inviting the learners to share past exposure to design thinking and associated success stories will bring their existing experience into the classroom.
- Asking learners about past barriers to success, allows for customization of the course to help them overcome those barriers.

Relevant: Relates the learning to a person's goals

- Asking learners about their goals will allow for tailored exercises and examples throughout the course.

Practical: Applicable to real-life situations

- Asking learners about their projects will allow for tailored exercises and examples throughout the course.

Collaborative: Respectful coaching based instruction

- Learners are asked for feedback on the course throughout the experience in order to continually optimize and make sure the course is fitting into their project work

- Learners are always invited to share relevant background information and prior knowledge.
- Teaching is done using a coaching-based model, rather than a didactive one, to establish rapport with learners.

Experiential: Immersive, engaging and interactive for different learning styles

- Utilize different methods of teaching, including lectures, videos and in-class practice.
- Allow learners to practice methods using their existing project work to make sure all methods are relevant.

Flexible: Adaptable to different levels of experience

- Learners are able to share their level of experience and gain additional coaching if needed.
- Partnering with other learners enables them to learn from each other not just from instructors.

There are also three main types of learning styles:

Our learning model also addresses these:

Visual: See process visualized, step by step.

- Leverage video demonstrations, in-person demonstrations and well as written instructions to appeal to visual learners.

Auditory: Hear process described.

- Utilize traditional lectures with the ability to stop for a dialogue within the lecture and to record the lecture for later playback ensures processing by auditory learners.

Kinesthetic: Perform tasks.

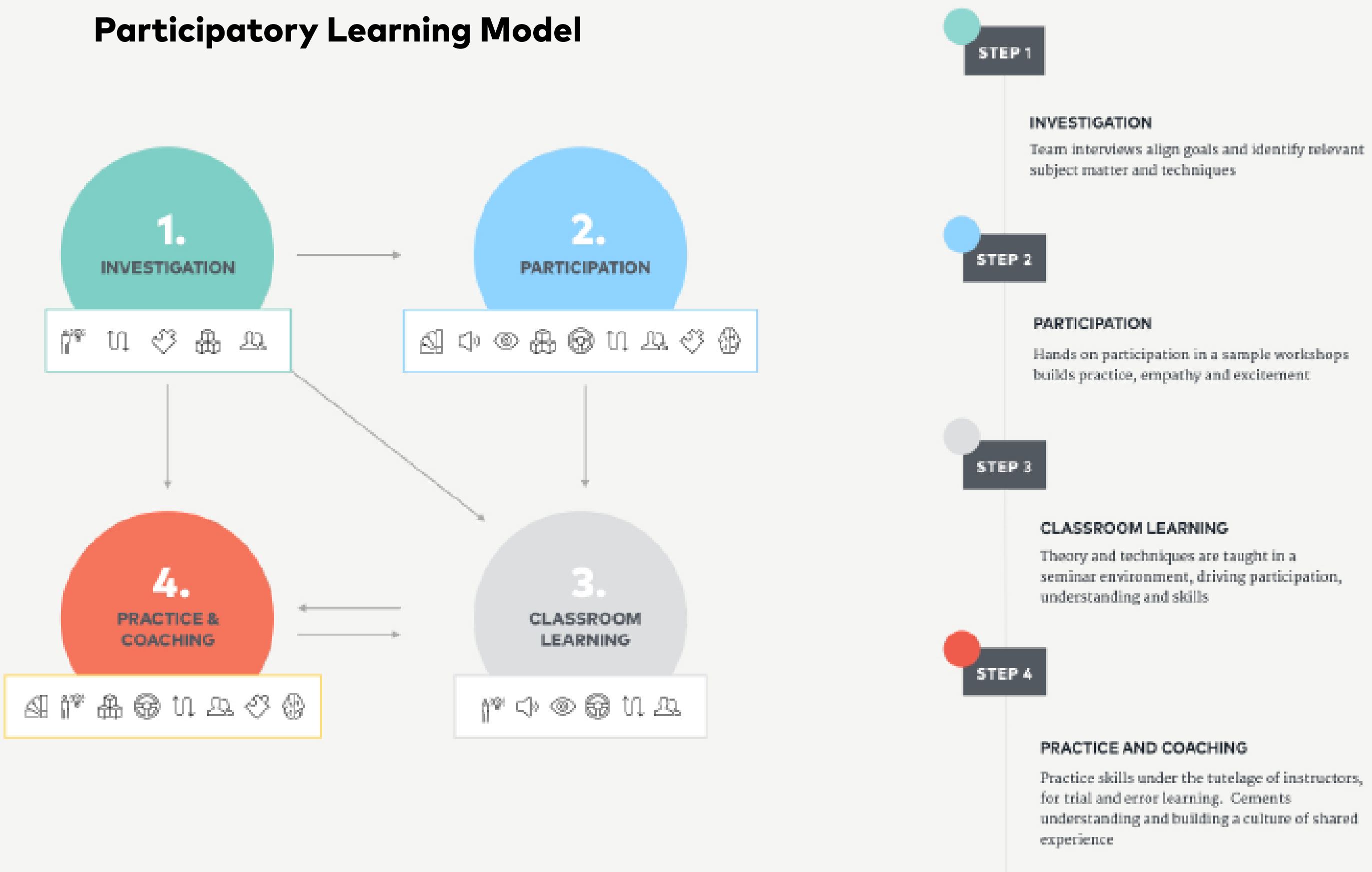
- Including project based learning such as practicing affinity mapping on a white board, running classmates through sample usability testing scripts, and journey map sketching so learners can experience trial and error ensures comprehension by kinesthetic learners.

PARTICIPATORY LEARNING

Participatory Learning is ultimately about facilitating a process of collective analysis, learning, and problem solving amongst a group of people. By approaching students as both collaborators and objects of study–to be learned from, about and with–learning and teaching become mutual between instructor and learner. When implemented well, participatory learning increases collaboration, subverts hierarchies, encourages agility, and rapidly increases skill acquisition. The practice of Participatory Learning can be used successfully as a pedagogical method in schools, in community planning, and in professional settings as professional development.

Our Participatory Learning Model has four key steps:

Participatory Learning Model



Each step is grounded in adult learning theory and our model adapts to all learning styles, while utilizing methods and approaches drawn from Design Thinking, UX, Service Design, and Business Administration:

01. Investigation

In this step, the instructor interviews stakeholder and the learners. This uncovers a wealth of information about participants, their past background, expertise, and relevant subject matters for adapting exercises. Acquiring this knowledge enables the facilitator to ground learning in learners' knowledge and expertise, and to adapted topics appropriately. It also establishes the basis of collaboration between the instructor and the learners, fostering a dialogue that can be sustained throughout the course for feedback and optimization. Learners' experience levels are also uncovered to ensure content is tailored to different levels.

Methods to be utilized:

- *Stakeholder Management*
- *Business Model Validation*
- *Guided Sensory Brainstorming*

02. Participation

Learners are run through sample workshops and exercises as participants. This gives learners exposure to the techniques without needing to master the methods, it establishes a common experience for all participants, and builds empathy for the process and actual excitement since learners are able to use these techniques successfully solving a real problem for real people. Participation ensures that all learning styles are being addressed and also allows the learner to establish their own opinions and approach to the techniques in an autonomous fashion. The topics of the practice workshops should be relevant and practical to learners' current business problems. These workshops, by their very nature, reinforce the collaboration between students and instructors as they are experiential and flexible in their delivery.

Methods to be utilized:

- *Affinity Mapping*
- *Design Studio*
- *User Journey Workshops*
- *Persona Role Play Improv*

03. Classroom Learning

After experiencing the techniques, learners are taught the theory behind each technique as well as how to execute it. There are mini practice opportunities within the classroom environment as well. But students are mostly learning the practical skills for setup and execution of the techniques.

All learning styles are catered to within the classroom setting. Learners are able to direct their study autonomously through readings and design of in-classroom exercises. The study is always grounded in the shared experience of past participation which further drives collaboration and flexibility.

Methods to be utilized:

- *Lecture: instructors will choose from a sampling of desired methods, using lecture to teach the theory behind these methods.*

04. Practice & Coaching

Learners are given the opportunity to plan, execute and analyze the new techniques under the coaching of the instructor. This trial and error approach reinforces the need for autonomous, grounded, relevant, practical, collaborative, experiential and flexible learning experiences. Learners bond and create a shared culture around their successful mastery of the techniques, cementing their ability to socialize the techniques with their colleagues.

Methods to be utilized:

- *Coaching: instructors will give adult learners the opportunity to teach and conduct activities on their own, while providing support, facilitating questions, and providing feedback, including facilitating adult learners' assessment of their own performance.*

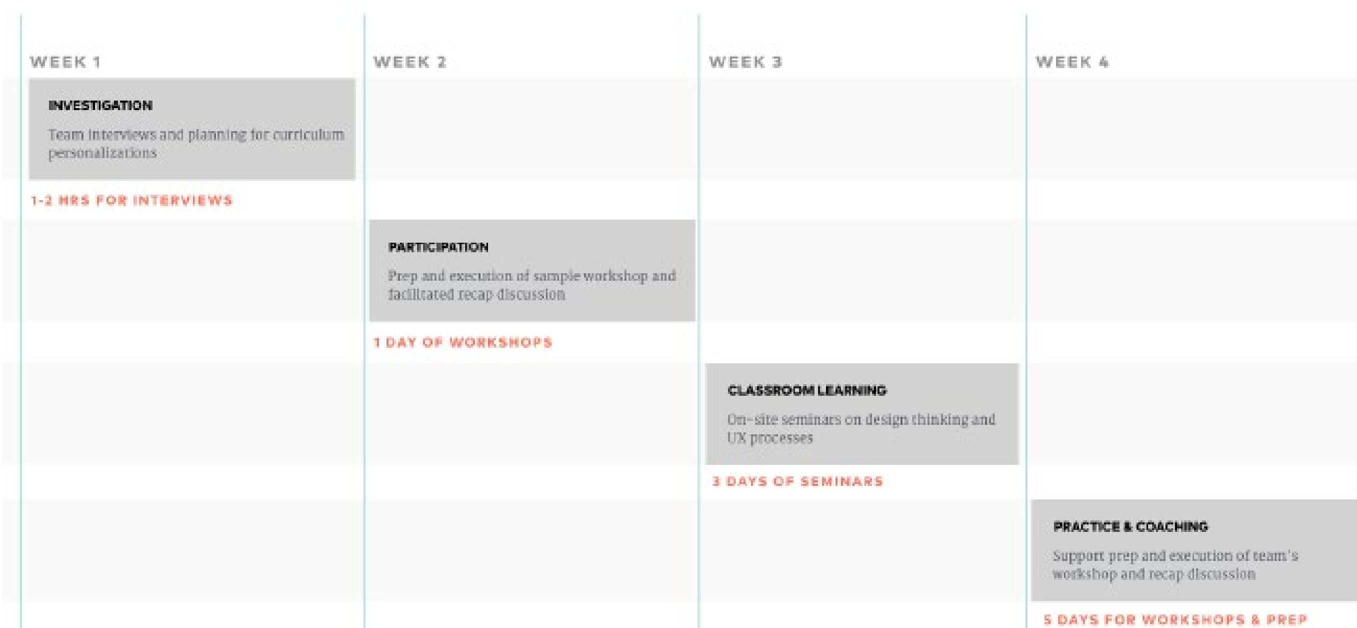
The different steps of the Participatory Learning Model are interdependent and reinforce the overall adoption of the new techniques. The different steps of the Participatory Learning Model are interdependent and reinforce the overall adoption of the new techniques.

Without any of the steps, the training is not as effective. Each step is interconnected, and it is critical that the steps take place chronologically, as each step builds upon knowledge gleaned in previous steps:

- Step 1, **Investigation** is a key step in planning out the other three steps and making sure that all content is relevant and sufficiently flexible, grounded, and practical.
- Step 2, **Participation**, builds off of the learnings of the Investigation phase and establishes a baseline of competency for all participants.
- It also creates a shared experience for grounding knowledge within Step 3, **Classroom Learning**.
- Step 4, **Practice & Coaching** is the culmination of the entire experience and leverages what students have learned throughout the entire course. It also establishes a means by which learners can socialize their learnings with other team members who have not participated in the same training.

Each step can take as little as a week to complete. Being exposed to this content over time, and building on each step will enforce the skills. It is important to not let too much time go by in between steps, as this ensures that all knowledge is fresh in participants minds as they advance through the steps.

Class Timeline



SCALABILITY AND ONGOING DEVELOPMENT

Not every organization is ready to adopt a fully self-driven learning program. And while the learning model detailed above provides a framework for getting started, the transformation of an organization takes time and significant effort at all levels of the organization. Though an organization might acknowledge that they need to change, gaining the momentum to do so can be daunting and sheer desire might not be enough.

01. Choose an innovation partner to seed the appraoch

Insurance and financial services organizations are no strangers to working with agencies, consultancies and other outside partners to help them execute projects. These types of partners are often brought in when an organization knows they must achieve a critical milestone on a project, but business as usual isn't bringing them any closer to their goals. And while this approach may work on a project-to-project basis, it doesn't bring about the kind of institutional change necessary to truly transform an entire organization.

We recommend that these organizations partner with creative agencies and consultancies who, rather than just using design thinking and UX methodologies to develop more customer-centric solutions, can actually implement a learning model like that outlined above to seed change within the organization, and help the organization build this same capacity within.

02. Start small and be targeted

The kind of hands on, participatory approach described above cannot be implemented across an entire organization at once, nor can it take place within a vacuum. The idea is that the approach is contagious, and spreads across the organization organically. In our experience, we often see organizations make the mistake of trying to overhaul their entire way of doing things at once, or limiting these types of creative and innovative approaches to a self-contained group of people, stifling the spread of ideas.

It is best to look to a special cross functional team that is integrated across the organization to pilot the learning model. One example of this type of team might be a group of interns. They are often young, and in being so, open to new ways of thinking and willing to experiment. Additionally, depending on the size and structure of the organization, interns tend to work across all parts of the organization and also form deep bonds with key hiring managers within their functional areas. If interns can show rapid progress, and can advocate their process to their individual managers, they have already started to spread the change across the larger network of the organization. If that cycle comes together, the spread of these ideas can be rapid.

Should you choose to pilot the program with interns, we also recommend instituting the model simultaneously with a special project team to ensure the ideas are infusing all levels of the organization. It is critical that all such teams are cross functional, and not comprised of members of a single department.

We recommend that the composition of a special project team including mid-level employees–anywhere from Associate VP level to Senior Managers–and some combination of the following:

- **Marketing**: Someone who is customer facing and can advocate for customer needs
- **IT**: Someone with experience supporting a project from a technical standpoint
- **Business**: Someone who is core to the products and services the organization is selling

Running these programs simultaneously seeds change at multiple levels of the organization, and provides an internal framework for advocacy, especially as newer employees may run into resistance.

Seeing employees succeed at using new methods, teaching them to their own managers and returning as full time employees with these skills, can transform an organization in as little as 6 months.

Regardless of which team you start with, the cornerstone of this program is in leveraging the network effect and encouraging the adult learners to teach these methods across the organization and induct others into these methods.

03. Nurture advocates through ongoing coaching

In order to achieve a critical mass, we recommend continuing to work with an external coach and trainer on a regular basis. While the participatory nature of the learning model provides adult learners with ample opportunities to practice the methodologies within their training cohorts, the key to institutional change is in being able to transfer these new found skills to the regular working environment and experience success outside of the ‘classroom’.

Having access to ongoing coaching and feedback, even if infrequently, gives adult learners opportunities to refine their skills and ensure they are successful in the natural environment–a.k.a the workplace. Having access to ongoing coaching also models this behavior to employees, establishing a general culture of openness, flexibility, and the expectation of personal and professional development, all of which are valuable in helping an organization become more customer focused.

04. Institutionalize the learning model

If teaching, training and coaching is required of all learners as a means of cementing their understanding and getting others to practice these methods, the ideas are more likely to spread. We recommend institutionalizing the learning model–eventually making it a part of an onboarding process that everyone goes through, an official professional development opportunity, or a company-wide initiative.

When doing so, it is critical to do everything you can to help employees see the training regimen as an opportunity for personal and professional growth, not a mandate. Developing a culture of celebration and ceremony around completing the course and sharing project ideas and associated business impact can help all employees see the value. Involving the external coach in some of these activities, especially early on, can help facilitate the transfer of stewardship to internal members of the team.

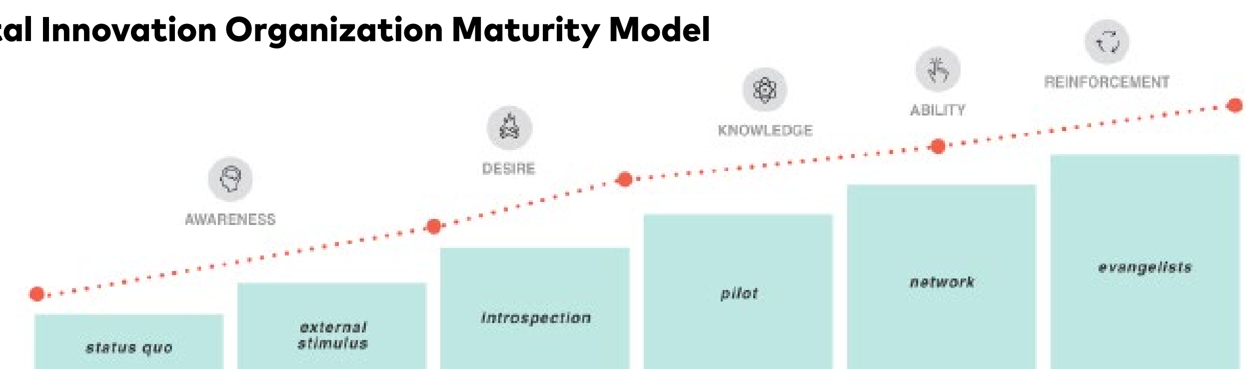
Change owned, groomed and operated by an internal team is critical to the success of such a model. Any way that organizations can provide positive reinforcement around adoption, ownership and success, the better the outcomes will be.

05. Stick it out when things get tough

The true sign of full adoption is being able to maintain and evangelize these newfound methods, even in the face of setbacks. Being able to embrace a culture of failing fast and incremental iteration helps to overcome the doubt that naturally creeps in when there are setbacks. Pushing through those doubts, continuing the practice regularly, and inducting other members into these methods will help ensure the success and adoption required for true organizational change.

Organizations tend to move up in maturity in terms of their readiness for such practices and their ability to sustain and grow. The below maturity model shows the different stages organizations go through. This model can also be used as a diagnostic tool for understanding how easily an organization will embrace this sort of training.

Digital Innovation Organization Maturity Model



	status quo	external stimulus	introspection	pilot	network	evangelists
GOALS	• Desire for rapid growth	• Rapid growth in a key strategic area	• Overcome stagnation	• Leverage pilot program as a test and learn incubator for organizational change	• Organic propagation of change throughout the organization	• Change is owned and propagated by internal teams
TACTICS	• Top-down directives for change	• Hire outside consultants for project-based work	• Consensus based decision making	• Choose a low-risk cross-functional pilot team for innovation training and project based practice	• Celebration of success stories and sponsorship of individuals for training and project-based practice	• Internal lead training and coaching
CHALLENGES	• Slowed teams, repeating old tactics with only incremental improvements	• Push-back from internal teams to collaborate with outside consultants	• Difficulty implementing past innovative work	• Overcoming fear of failure and choosing the right projects that have impact and visibility	• Seeding change to drive organizational transformation	• Keeping momentum through set backs

What you don’t know *can* hurt you.

Things to Remember

01. Expect pushback (and plan for it).

When teaching adults in a corporate environment, it is likely they have never been exposed to many of the activities and methodologies you are encouraging them to participate in. Hot pink sticky notes and sharpies are not necessarily the staples of a corporate conference room. In our experience, it will take a little time for participants to get on board with what you are doing. To make them believers, they'll have to see the fruits of their labor immediately.

> It wasn't a week later that they were convinced. It was an hour later.

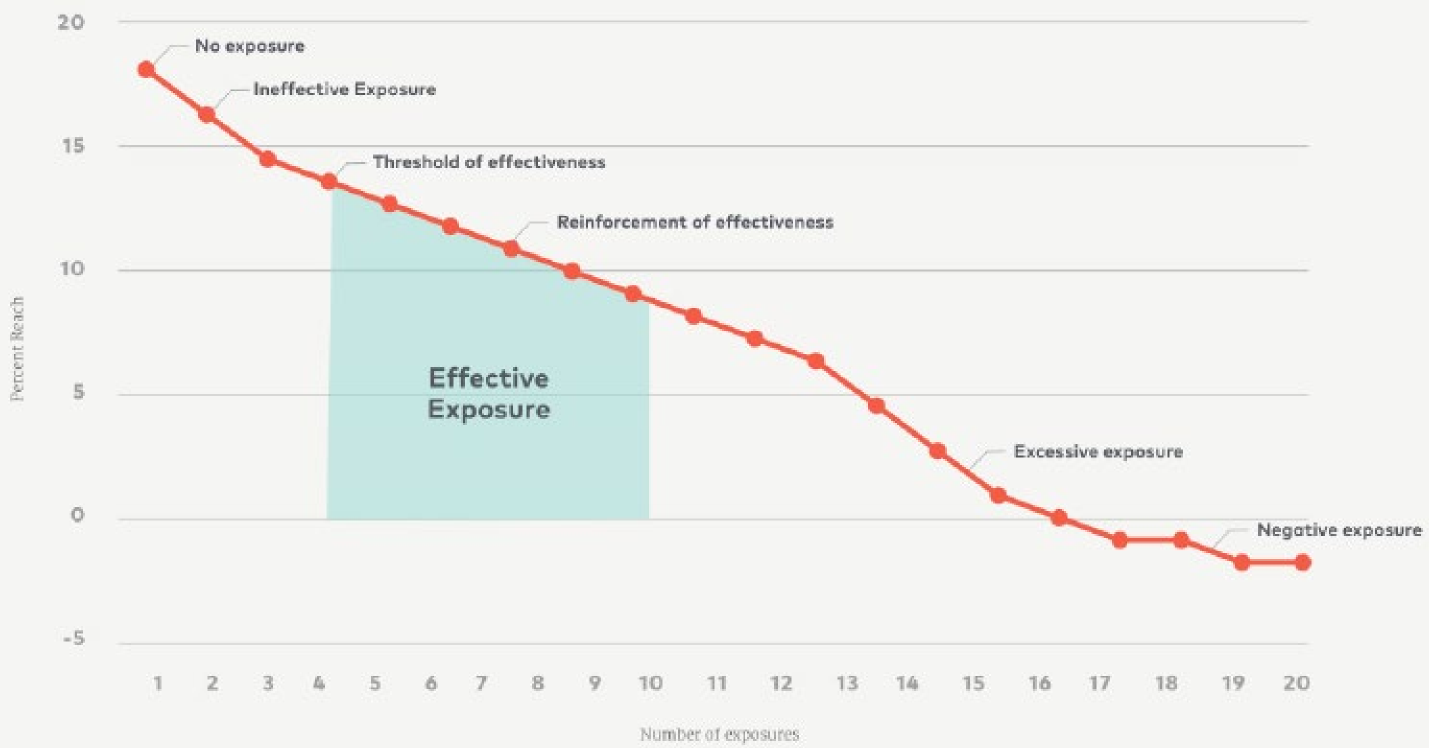
Years ago, during our first engagement with one of our insurance clients, we lead a Design Studio exercise to help the team generate ideas for the design project we were working on. The meeting brought together all aspects of the business, including calims, operations, IT, and marketing to brainstorm a new design for their website. About an hour into the meeting, the project sponsor pulled our account director aside to express his concern that the techniques we were using were not going to work on his team. He thought the Design Studio may not be the best use of their time and that it was not going to generate any useful ideas. We asked him to give us another hour. Within the hour the juices were flowing: participants were sketching out their ideas, sharing and ranking them, and getting feedback from everyone on the team. By the end of the session we had a prototype ready for testing. It wasn't a week later that they were convinced, it was an hour later. We had made them believers.

2 years later, this same project sponsor asked us to come back and teach the entire company to do what we do.

This story reinforces the need for Step 2, **Participation**. Make sure that the participants are included in the actual design process before you try to teach them the mechanics (ie. Step 3). Teaching the concepts before experiencing the success of actually participating in the activities will make it more difficult to secure buy in from learners

As we know from marketing practice (and depicted in the graph below), targets must be exposed to a message multiple times before they are imprinted with it and act. The same goes for education: having multiple touch points and options for iteration of each throughout all of the four steps will aid in the effectiveness of the training, and help ensure skill acquisition.

Marketing Effective Frequency



McGraw-Hill Education, Effective Frequency, 2015

02. Theory isn't enough (and neither is practice).

Anyone can read articles about design thinking, watch web training videos about user testing, or listen to a Ted Talk about the power of collaborative brainstorming, but to retain learning and actually transfer new skills to the work that we do requires multiple levels of exposure and access to a variety of different kinds of learning opportunities

In their work studying the effectiveness of training teachers in public schools, Joyce & Showers found that:

"Training that only consisted of theory and discussion produced a modest gain in knowledge and the ability of teachers to demonstrate the new skills in the protected training environment but there was no transfer to the classroom. More substantial gains were made when demonstration, practice, and feedback were added to theory and discussion in a training workshop, but still with little use of the new skills in the classroom. When on-the-job coaching was added large gains were seen in knowledge, ability to demonstrate the skills, and use of the new skills in the classroom with students." (Joyce & Showers, 2002)

And while there is not necessarily a 1:1 correlation between teachers and corporate employees, the same principals apply: adult learners will be more effective at retaining and applying the skills they learn when exposed through theory, practice, and coaching. Theory, on its own, is never enough.

Effectiveness of Training Techniques

TRAINING STEPS	ACQUISITION OF SKILL KNOWLEDGE	ACQUISITION OF SKILL	APPLICATION OF SKILL TRANSFER
THEORY	*Middle to high*	*Low (5%)*	–
DEMONSTRATION	*High*	*Low (3-5%)*	–
PRACTICE & FEEDBACK	*High*	*High (80%)*	*Low (5-10%)*
COACHING	*High*	*High (95%)*	*High (80%)*

Joyce & Showers (2002)

03. Change doesn't go "viral" on its own.

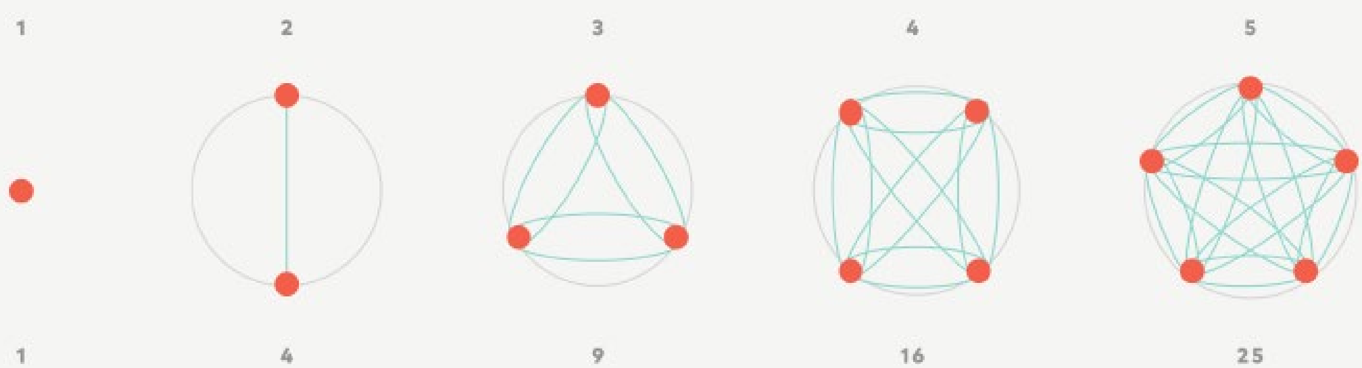
The network effect is a key principle in driving change across an organization. The more participants you have, the larger the gains will be. Yet, as we see from Metcalf's Law, meaningful change can start with just a few people. The key is in making everyone you train an expert and an advocate who can carry the ideas and methods they learn into other areas of the organization.

There are a few key things you can do to ensure the learning doesn't stop with you, but is infused throughout the organization:

- **Provide learners ample opportunity to practice and execute the methods you are teaching,** both within training sessions and within the organization at large. This will require collaboration with the larger organization to ensure these opportunities are made available.

- **Train at multiple levels and across functions.** Only training one group within a particular aspect of the business will limit organizational transformation. Ensuring that training sessions include individuals from across the different business functions and at different levels within the organization will give you advocates in many places.
- **Don't underestimate the importance of on-the-job coaching.** As discussed above, theory and practice alone are not enough. Ensuring all learners have access to on-the-job coaching will be vital in ensuring information and practices spread across the organization and that techniques are being implemented effectively. This also provides a means of modeling to learners how they can support their colleagues in a similar capacity.

Network Effects Metcalf's Law



Love (2012)

04. Materials matter. No really, they do

Half of the reason design thinking and UX techniques work is because they are fun. They get people involved in learning in a way they actually enjoy. Which is to say, that the materials–the colorful post it notes, the sharpies the scissors, the tape and highlighters–they actually matter. Fun, colorful, and creative supplies make people forget they are working and help them feel more open to taking risks, sharing ideas, and being experimental. Neon post-it notes will bring a smile to the face of any participant, while at once symbolising a shift in mindset from work to fun, important to getting the creative juices flowing.

Having a ready-made kit always available removes the friction of assembling everything, and makes these activities feel more accessible.

When the tools are on hand, they can be done at anytime without advance preparation.

For many people, these materials tap into the same excitement they likely felt on the first day of school, when they got to use those fresh new crayons for the very first time. Play into that nostalgia.

05. Being creative and innovative can be a powerful mechanism for recruitment.

All companies are competing for the same top talent. Because of the insurance industry's reputation for being slow, bureaucratic, and behind the times, it can be especially difficult for them to compete for top talent. Training programs and innovative ways of working are key ways of attracting these the kind of talent needed to infuse more creative practices into the organization. Millennials in particular are looking for more out of their work than traditional workplaces, especially in the financial world, have to offer.

Five Trends Shaping the Future of Work

Gorman (2014)

So when hiring younger talen, what skills are critical for the new innovative workforce? Digital work requires a large selection of skills, including: research, strategy, design, testing, prototyping and more.

On the contrary, you do not want hire a single person to fill all of these roles, nor do you want your team members to only be hyper-focused on one of these digital skills. It's best to build small teams of three to five people who overlap in their digital skillset. T-shaped team members who possess one deep functional skill and a breadth of other skills will work great with other other T-shaped teams who have complementary skills (Goldschmidt, 2017).

For many insurance and financial services organizations, focusing on hiring talent with digital skills is quite a departure from the traditional skills they have recruited for in the past. And while all team members should possess the analytical skills needed to understand insurance industry, building teams with digital capabilities and design thinking skills will further foster innovation and customer-centricity within your organization, igniting the spread of ideas.

The Spectrum of Digital Skills

To be able to teach innovation is to be able to innovate.

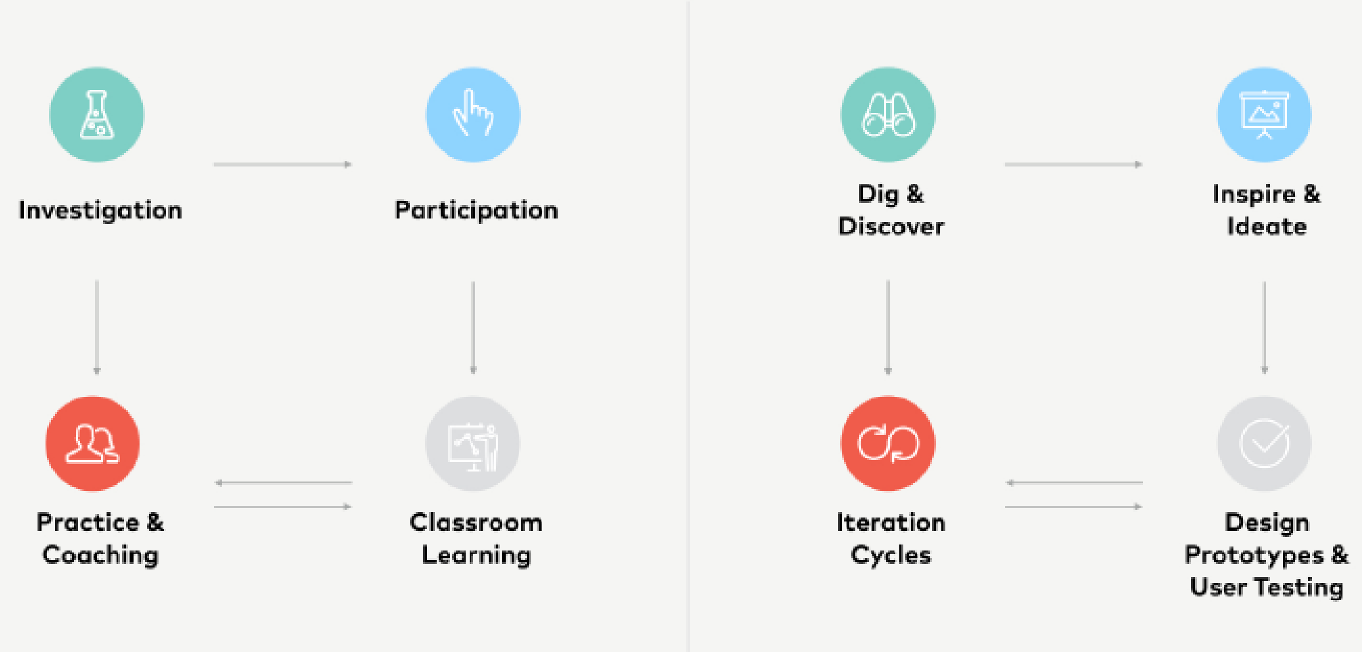
Conclusion

Teaching user centered design techniques–and watching them transform an organization–is not all that different from practicing user centered design, and seeing an experience fundamentally transform the way people do things. Both follow the same basic structure of design thinking, because both are grounded in helping people. The four steps of our participatory learning model can be easily mapped to our agency's actual design practice.

When working with clients we start with investigation and uncover user needs–step 1. We then move into ideation, which, like step 2 of the process, is where our team starts testing out ideas and honing in on a hypothesis. The kind of classroom learning that happens in step 3 is not unlike a series of working prototypes, which we test out with users (or in this case, learners), until something clicks, with the modification happening in real time. Finally Step 4, Practice & Coaching is nothing but iteration cycles for getting the techniques down correctly.

It is important to draw this parallel in structure, as it reminds us that when we are teaching these techniques what we are actually doing is designing an experience–a different way of working–that, like the products we strive to design with our clients, is better for everyone: for customers, for employees, and for business. At the end of the day, the skills needed to teach customer-centric innovation are the same skills necessary to innovate customer-centric solutions. Why not be an organization that does both?

Learning vs Making Model



About Cake & Arrow

Cake & Arrow is a customer experience agency who partners with insurance and financial services organizations. We're leading global digital initiatives with MetLife, ProSight, among others, for launches that span life, group benefits, P&C, and specialty. We use customer data to achieve results, focusing on increasing policy renewals, driving profitable growth, and creating digital experiences to get you closer to customers and allow for more self-service.

To learn more about how Cake & Arrow can support your business, including how we can train your organization to become more innovative and customer focused, visit our website at cakeandarrow.com or email us at biz@cakeandarrow.com.

About The Authors

VP OF CUSTOMER EXPERIENCE & DESIGN

Christina Goldschmidt

Christina leads our team responsible for conducting research to generate user insights, develops the strategy for the experience and content on the products we make for clients, and designs the information hierarchy of those products and all interactions. She and her team test and validate everything we make to keep everyone focused on the end goal.

Christina's diverse career began in archeology and anthropology, where she first started her quest to understand what makes people tick. Finding the web changed her life. She's been obsessed with HCI and usability ever since and has experience in a range of industries and Fortune 500 companies including American Express, The Discovery Channel, Omnicom Media Group, and Morgan Stanley. Varied roles in digital—from developer to visual design, digital marketing to UX—have not only made her an excellent mentor at Cake & Arrow, but a UX instructor at NYC-based General Assembly and a member of the Design Thinking Advisory Board at Rutgers University. She has a BS from Rensselaer Polytechnic Institute and an MBA from the NYU Stern School of Business, where she currently conducts Design Thinking workshops.

COMMUNICATION & MARKETING MANAGER

Emily Smith

Emily oversees all aspects of our brand identity and external communications. She runs a rigorous content strategy tailored to our unique audience that at once reflects our human-centered values, our research-oriented work, and our deep expertise within the verticals of financial services, ecommerce and insurance. She is a thoughtful writer, editor and curator of content who enjoys rallying people around ideas, strategizing, and facilitating discussion.

Emily began her career in journalism, which is where she developed a keen interest in storytelling, and in gaining a better understanding of the human perspective. Before transitioning into marketing, Emily spent several years as a high school English teacher in Brooklyn, sharing with her students her love of language, ideas, and storytelling. She soon found a way to funnel her passion for education and writing into a successful career as a marketer, working for several years within the EdTech industry before finding her way to Cake & Arrow. Emily holds a BA in Journalism and an MA in English Literature & Digital Humanities from the University of Victoria in British Columbia.

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Glossary of Methods

DESIGN THINKING METHODS

DESIGN THINKING METHODS:

Systematic Brainstorming Techniques

Imagine new ideas by using external stimulus to change your perception of the problem.

MATERIALS	ROLES
· *Post-it notes (small & wall sizes)* · *Sharpies* · *Timer*	· *1 Facilitator* · *1 Time Keeper* · *Participants*

STEP 1

FRAME THE PROBLEM

Explain the problem you are trying to solve. As a group choose an area to focus on that will further your goals.

STEP 2

STIMULUS

The facilitator should choose a stimulus to help the group start thinking of the problem differently. This can be something like the opposite of the goal, a heavily exaggerated version of the goal, or choosing a word that participants will need to fit a solution into.

WORDS WITH PHYSICALITY AND BRAND ATTRIBUTES ARE THE MOST HELPFUL, LIKE UMBRELLA OR TEDDY BEAR

STEP 3

CARD STORM

For 5-10 minutes, each team member works alone to think about the stimulus and the problem and write down individual ideas on the small post-it notes.

STEP 4

SHARE AND ANALYZE

Each team member shares their ideas. Go around to all participants and then allow everyone to vote on their top ideas. Redo the brainstorm as needed.

DESIGN THINKING METHODS:

Affinity Mapping

Collect all of your ideas, from brainstorming or research, and organize and group them to generate key themes.

MATERIALS	ROLES
· *Post-it notes* · *Sharpies* · *Whiteboard* · *Whiteboard markers*	· *1 Facilitator* · *Participants*

STEP 1

GENERATE RAW IDEAS

As a team, start with a brainstorming session or notes from research sessions. Write each idea onto a post-it note. Don't worry if there are duplicates.

STEP 2

SHARE IDEAS

The first participant shares each of their ideas and puts them up on the whiteboard. They should also start to form groups of any like items.

IT DOESN'T MATTER WHERE YOU START. YOU CAN EDIT GROUPINGS AS YOU GO OR AFTER ALL POST-IT NOTES ARE SHARED

STEP 3

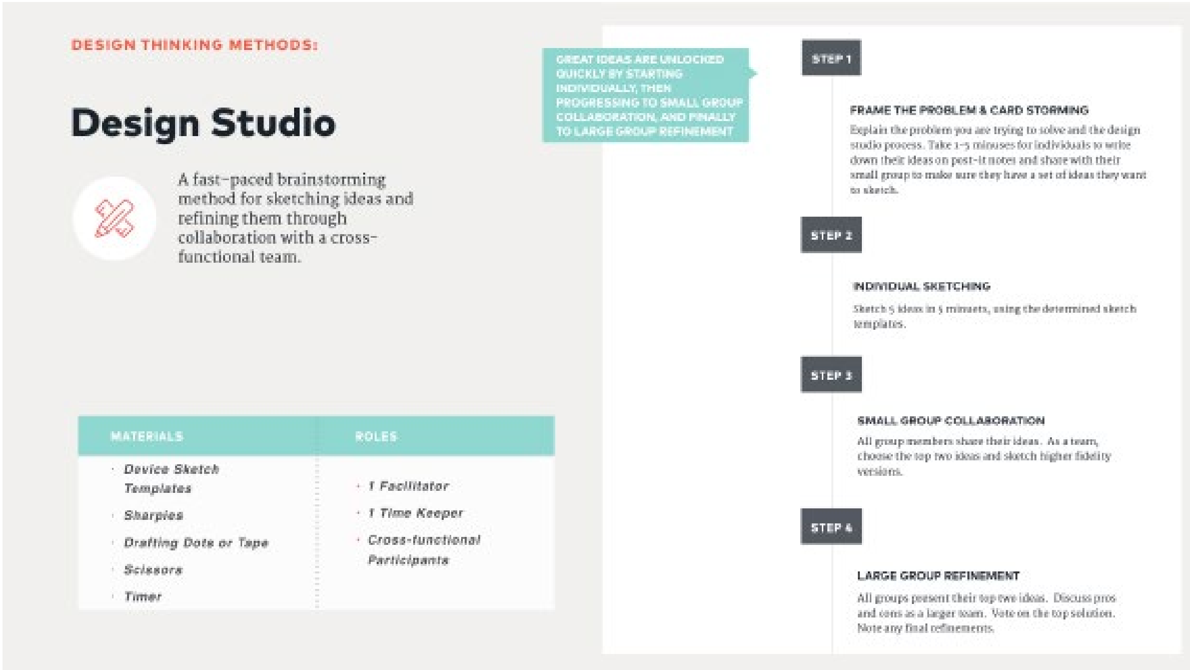
GROUP IDEAS

Each participant should share their ideas, adding them to the exiting groups and singling out any new concepts. Make sure that all participants have shared their ideas. Go as fast as possible.

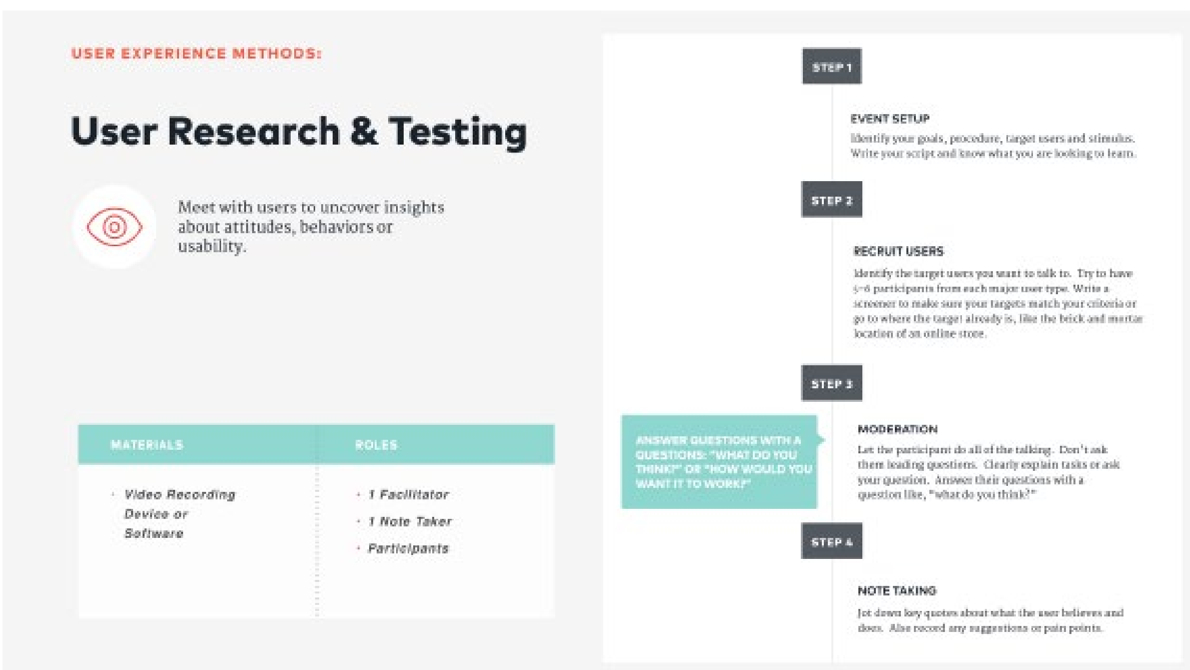
STEP 4

SHARE AND ANALYZE

As a group, discuss each of the categories and debate them. Form new groups as needed. Draw a circle around each final group and give each group a summarizing name.



USER EXPERIENCE METHODS



USER EXPERIENCE METHODS:

User Insights

After conducting user research or testing, analyze the data to understand what users really want and need.

MATERIALS	ROLES
· *Post-it notes* · *Sharpies* · *Wall or Whiteboard*	· *Team members*

STEP 1

KNOW THE GOAL OF YOUR RESEARCH AND ALWAYS KEEP THAT IN MIND WHEN ANALYZING DATA

IDENTIFY DATA

For research, separate quotes into attitudes, behaviors and pain points and write each on a post-it note. For concept or usability testing, write each failure point and suggestions on a post-it note.

STEP 2

GROUP IDEAS

Read each data point out loud, create groups of data with the post-it notes on a wall or whiteboard. Move them around and try different groups.

STEP 3

ANALYZE DATA

As a group, discuss each of the groups and debate which are most important. Form new groups as needed. Draw a circle around each final group and give them a summarizing name.

STEP 4

INSIGHT IDENTIFICATION

Analysis can reveal user data to construct a persona or profile or be used to form a strategic collection of usability changes.

USER EXPERIENCE METHODS:

Information Architecture

Help users understanding their surrounding and find what they are looking for via the proper structuring of information.

MATERIALS	ROLES
· *Markets* · *Note Cards*	· *1 Facilitator* · *1 Note Taker* · *Participants*

STEP 1

EVENT SETUP

Identify your target users and their goals for your experience. Record the data elements and know what you are looking to learn.

STEP 2

RECRUIT USERS

Identify the target users you want to talk to. Try to have 5-6 participants from each major user type. Write a screener to make sure your targets match your criteria or go to where the target already is, like the brick and mortar location of an online store.

STEP 3

CARD SORTS CAN BE OPEN OR CLOSED. OPEN CARD SORTS LET THE USERS NAME THE TOP LINE CATEGORIES WHERE AS CLOSED CARD SORTS GIVE THEM THE CATEGORIES TO WORK WITH.

CARD SORTING

Write each piece of information on an individual card. Shuffle the cards and let each participant order them. Ask them to group like items together. At the end they should assign category names to each group.

STEP 4

ARCHITECTURE DEVELOPMENT

Consolidate all of the data from each session. Develop a master site structure based on the average approach across all tests.

USER EXPERIENCE METHODS:

Personas

Create a portrait of key user groups to serve as a point of reference for user-centered decision making.

MATERIALS	ROLES
· *Post-it notes* · *Sharpies* · *Wall or Whiteboard*	· *Team members*

STEP 1

IDENTIFY DATA

For research, separate quotes into attitudes, behaviors and pain points and write each on a post-it note. Tag each point with demography, or psychographic info.

STEP 2

GROUP RELATED DATA

Review the data and group it by different demographics or psychographics to try and form unique user types by behaviors and mindsets.

STEP 3

ANALYZE DATA

As a group, discuss each of the groups and debate them. Form new groups as needed. Draw a circle around each final group.

STEP 4

PERSONA FINALIZATION

Name each persona with a nick name. Fill in any blanks with data from secondary research and stakeholder interviews for a full picture of each user.

GIVING EACH PERSONA A NAME ISN'T NECESSARY, BUT IT DOES HELP TEAMS EMPATHIZE WITH USERS BY VISUALIZING THEM AS REAL PEOPLE

SERVICE DESIGN METHODS

SERVICE DESIGN METHODS:

User Journey Workshops

Uncover the key points in an experience. Identify the user's needs and feelings at each touch point.

MATERIALS	ROLES
· *Post-it notes* · *Sharpies* · *Wall or Whiteboard*	· *1 Facilitator* · *1 Time Keeper* · *Team members*

STEP 1

EVENT SETUP

Identify your goals and target users.

STEP 2

GENERATE A JOURNEY MAP GRID

Create a grid to represent the customer's experience. On the y-axis list out information you are looking to uncover. Across the top, list out the points in the journey, these could be steps in the customer lifecycle .

KEY POINTS TO UNCOVER COULD BE THINGS LIKE TASKS, EMOTIONS AND KEY TOUCH POINTS WITH THE COMPANY

STEP 3

SMALL GROUP COLLABORATION

Break into small teams and brainstorm key points in the journey. Write each one down on a Post-it note and place it on your grid. Discuss as a team and refine.

STEP 4

LARGE GROUP REFINEMENT

All groups present their journey maps. Discuss pros and cons as a larger team. Consolidate information and vote on any ideas that you can't form a consensus on. Note any final refinements

SERVICE DESIGN METHODS:

Persona Role Playing and Improv

Act out the personas you are solving problems for to uncover their voice, issues and needs.

MATERIALS	ROLES
· *Post-it notes* · *Sharpies* · *Wall or Whiteboard*	· *1 Facilitator* · *1 Time Keeper* · *Team members*

STEP 1

CREATE TEAMS

Break into groups of 3; one person plays the customer, another plays the experience and the third is a note taker. Plan out what aspect of the user journey you want to role play, it could be before the interaction, during or after.

STEP 2

ROLE PLAY SCENES

SURFACE ANY QUESTIONS, FEARS, AND POINTS THAT MAKE YOU UNCOMFORTABLE OR EXCITED

The two team members act out a scene as if the customer is having a conversation with the experience. Talk about what you are feeling and thinking as well as questions, fears and watch outs. The third team member takes notes on key points of the conversation, generating one post-it note for each idea..

STEP 3

SHARE AND FINALIZE

All of the teams get back together and present their observations to the group. Other groups chime in on areas that were similar and different. Discuss how to consolidate and incorporate any new ideas that emerge in the discussion.

STEP 4

DOCUMENT

Consolidate the final master experience by ordering key post-it notes onto a large wall or whiteboard.

SERVICE DESIGN METHODS:

Sensory Brainstorming

Imagine new ideas by using external stimulus for each sense to change your perception of the problem.

MATERIALS	ROLES
· *Post-it notes (small & wall sizes)* · *Sharpies* · *Timer* · *Stimulus*	· *1 Facilitator* · *1 Time Keeper* · *Participants*

STEP 1

FRAME THE PROBLEM

Explain the problem you are trying to solve. As a group choose an area to focus on that will further your goals

STEP 2

STIMULUS

THE FACILITATOR CAN CHOOSE TO FOCUS ON DIFFERENT TYPES OF STIMULI FOR ONE SENSE OR CHOOSE ONE RELEVANT STIMULUS FOR EACH SENSE.

The facilitator should choose one of the senses and the accompanying stimulus to help the group think differently. If you are doing the sense of touch, choose something soft, rough, textured, etc.

STEP 3

CARD STORM

For 5-10 minutes, each team member works alone to think about the stimulus and the problem and write down individual ideas on the small post-it notes. Repeat this process until all stimuli are done.

STEP 4

SHARE AND ANALYZE

Each team member shares their ideas. Go around all participants and then allow everyone to vote on their top ideas. Redo the brainstorm as needed.

FACILITATION METHODS:

Stakeholder Management

Learn to understand each of your stakeholders, how they think and what information is most helpful to their decision making process in order to better influence them.

MATERIALS	ROLES
· *Post-it notes* · *Sharpies* · *Wall or Whiteboard*	· *1 Facilatator* · *Team members*

STEP 1

OBSERVATION

Each team member recalls a past interactions with the target stakeholder or actively observe recent interactions. Record perceived motivations, pain points, behaviors, common questions, liked data sources and decision trees.

STEP 2

PERSONA CREATION

As a team, conduct a persona workshop. Combine all of your observations. Pay special attention to common questions the stakeholder asks and data that they trust.

STEP 3

SCENARIO BRAINSTORM & ROLE PLAY

As a group, list common interactions with the stakeholder. Note any that tend to end in frustration. Break into groups of threes, and role play these scenes. One person will play themselves, one person will play the stakeholder and another will take notes.

STEP 4

PLAYING BOTH YOURSELF AND THE STAKEHOLDER IS CRITICAL TO BUILD EMPATHY FOR THE STAKEHOLDER AND UNDERSTAND THEIR VIEW POINT

COACHING

As a team, give the team member playing themselves feedback on when they missed a cue from the persona and how they can do better. Repeat role-playing so that each member has a chance to play themselves and the stakeholder.

FACILITATION METHODS:

Customer Feedback Gathering

Learn methods for quantitative collection of customer feedback.

MATERIALS	ROLES
· *Online Survey Software*	· *1 Research Designer* · *Participants*

STEP 1

EVENT SETUP

Identify your goals and target users. Document what you are looking to learn.

STEP 2

RECRUIT USERS

Identify the target users you want to survey. Write a screener to make sure your targets match your criteria. Identify the methods you are going to use to gain access to them.

STEP 3

A GOOD SURVEY QUESTION PROVIDES CRYSTAL CLEAR INSTRUCTION BUT IS NOT LEADING

SURVEY DESIGN

Learn to design surveys to gather feedback on a customer's experience or brand perceptions. Remember that demographic information always comes at the end to not impend filling out the key questions.

STEP 4

DATA ANALYSIS

Review the survey data and generate patterns. Establish benchmark data and continue surveying over time to record changes.

FACILITATION METHODS:

Cross-functional Team Facilitation

Feasible solutions are generated efficiently when cross-functional teams come together to ideate.

MATERIALS	ROLES
· *Post-it notes* · *Sharpies* · *Wall or Whiteboard*	· *1 Facilitator* · *Team members*

STEP 1

FRAME THE PROBLEM & CARD STORMING

Explain the problem you are trying to solve and the design studio process. Take 1-5 minutes for individuals to write down their ideas on post-it notes and share with their small group to make sure they have a set of ideas they want to sketch.

STEP 2

INDIVIDUAL SKETCHING

Sketch 5 ideas in 5 minutes, using the determined sketch templates.

STEP 3

SMALL GROUP COLLABORATION

All group members share their ideas. Team members ask questions and make suggestions on improving the ideas.

STEP 4

BY SWITCHING ROLES, TEAMS PUT THEMSELVES INTO THE SHOES OF THEIR CO-WORKERS AND IMPROVE ON IDEAS WITH THEIR OWN PERSPECTIVES

REVERSE ROLES

Team members from different backgrounds take turns defending other team members' ideas. The team takes note of the new ideas that emerge and make final edits.

FACILITATION METHODS:

Business Model Validation

Obtain a deep understanding of the business objectives, landscape and user behavior. Evaluate if approach is differentiated from the competition.

MATERIALS	ROLES
· *Post-it notes* · *Sharpies* · *Wall or Whiteboard*	· *1 Facilitator* · *Team members* · *Company Stakeholders*

STEP 1

FRAME THE ENVIRONMENT

Explore the problem you are trying to solve. As a group identify the environmental and situational changes effecting the problem and goals.

STEP 2

STAKEHOLDER INTERVIEWS

Interview key stakeholders from different functional teams. Probe on their role in the company, their goals and motivations and the challenges they are trying to overcome for success.

STEP 3

MODEL INVESTIGATION

Explore the company's model. Probe on their industry and its dynamics, competitors, substitutes, users, content, brand and technology. Pay attention to its approach to marketing and operations. Consider a SWOT analysis.

STEP 4

IF THE COMPANY OCCUPIES A CONGESTED QUADRANT, THINK OF MINOR MODIFICATIONS IN THEIR MODEL TO MOVE INTO DIFFERENTIATED SPACE

COMPETITOR MAP

Write down the company name on a post-it note, as well as all of its main and secondary competitors. Choose the axis and plot the companies in each of the 4 quadrants of the graph. Look to see if the area they are playing in is crowded or if there is an opportunity for true differentiation.

FACILITATION METHODS:

Lecture

Being able to teach a concept is the ultimate test of true understanding. Plus the network effect of training the trainer is critical for organizational change.

MATERIALS	ROLES
· Paper	· 1 Facilitator
· Pens	· Team members

STEP 1

UNDERSTAND THE MATERIAL

Team members should have an understanding of the topics they will be teaching. Teaching can help them cement their knowledge but it shouldn't be a new concept.

STEP 2

ADULT LEARNING THEORY

The facilitator should explain the basics of adult learning theory to each team member. It's critical to demonstrate it in action to be consistent with the theory.

STEP 3

ADVANCED LECTURING SKILLS GO BEYOND MASTERY OF THE SUBJECT MATTER AND GOOD PRESENTATION SKILLS. AND INCLUDE DRIVING ENGAGEMENT AND COMPREHENSION.

SAMPLE LECTURE

Each team member should have time to prepare and present a sample lecture. The other team members will role play being students.

STEP 4

COACHING

Team members should take turns giving the lecturer feedback. Team members should strive to include a positive element the instructor should keep doing and a constructive point for further practice. Repeat sample lectures until all team members feel confident.

FACILITATION METHODS:

Coaching

Using observation, listening, and feedback to empower continued growth and help others refine their skills.

MATERIALS	ROLES
· n/a	· 1 Facilitator
	· Participants

STEP 1

PREPARE

Participants record their goals and read background materials.

STEP 2

EVALUATION

Participants engage in a self-evaluation that helps to uncover behaviors, strengths and development areas in order to create a plan for growth and development.

STEP 3

ASKING QUESTIONS IS A FUNDAMENTAL ASPECT OF COACHING. LEARN THE RIGHT QUESTIONS TO ASK.

SKILLS DEVELOPMENT

Participants learn coaching frameworks and practice them in a classroom setting.

STEP 4

APPLIED LEARNING

Participants leave the classroom setting and practice their new skills in the real world. They meet with their coaches for additional reinforcements and trouble shooting.

CAKE & ARROW

A Transformation from Within

By Christina Goldschmidt & Emily Smith

June 2017