Strategy for Change Management

Why is change so &%$#@*% hard?
• I’m a big Learning Nerd.

• I try to help people do the right thing (whatever that is).

• Dual background in Instructional Design and UX (but we called it HCI then).

• Perpetually fascinated by when people know the right thing to do, but don’t do it.

Why I care about this
• It’s not magic (though I wish it was).

• I can’t fix the entire culture of your company (and that probably shouldn’t be your goal).

• The words “fast” and “change” are frequently oxymoronic.

A Few Disclaimers
Meet Linn

• Linn followed his old boss to a new company. His boss just got hired as the Director of User Experience for a company that makes medical record software.

• The company has never had actual UX designers before. Previously the software was designed by medical record experts working with programmers and a graphic designer.

• Linn is working with a group to update the record entry function, but he’s getting a lot of resistance to all his suggestions. He’s been told that they are already behind with the next features release, and there’s no time to involve users in the process.

• In particular, he’s been dealing with his nemesis, Carl. Carl is an old school medical records expert, who doesn’t really believe Linn can tell him anything about the medical record design.
• Gina is the product manager of one of the largest real estate search applications.

• They just released their next generation search application, which significantly redesigned the search process, and are currently running both versions.

• Customers who are subscribed to the first gen system do not have to switch to the next gen system, and are resistant because while the older system is horrible, it’s very familiar and comfortable horrendousness for experienced (and vocal) power users.

Meet Gina
WHY *IS* CHANGE SO &%$#@*% HARD?
Change Progression

- **Knowledge**
- **Attitude**
- **Individual Behaviors**
- **Group Behaviors**

Change process
• Familiarization

• Comprehension

• Conscious Effort

• Conscious Action

• Proficiency

• Unconscious Competence

**Reason #1: Unlearning is difficult**

- From Electronic Performance Support Systems by Gloria Gery

© Usable Learning 2013
This process takes a while
Fig. 6. PET images (41% atlas slice) of a subject in naive and practiced conditions, showing decreases in GMR. Glucose Metabolic Rate after several weeks of Tetris Practice

- (Haier et al 1992)
When you are used to this...
Reason #2: Cognitive Load

- Shiv and Fedorikhin 1999 - Heart and Mind in Conflict: The Interplay of Affect and Cognition in Consumer Decision Making
Willpower and Ego Depletion
Reason #3: Rational Decision Making

- Damasio, Descartes' Error: Emotion, Reason, and the Human Brain

© Usable Learning 2013
Suspension Bridges

Photo by Mike Taylor
We struggle without that emotional tug

Y’know, I just like the *feel* of no-load mutual funds...
The emotional element is elephant-sized

Jonathan Haidt, The Happiness Hypothesis
© Usable Learning 2013
The Rider

I should order a salad.

I really should get this homework out of the way.

Exercising now will give me more energy later.
The Elephant
So, when there’s a conflict...

Who do you think wins?
Meet my friend Sandra:

Reason #4: The Elephant isn’t stupid
If the initial experience is bad…

This *sucks*…I am *not* doing this again…

…why would somebody want to repeat it?
Behavioral Reinforcement
The elephant cares about what’s happening *right now*.

Maybe I should consider retirement planning…

Reason #5: Immediacy
And the future is sooooo far away...
### Classic “I know, but...” activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Immediate consequence</th>
<th>Delayed consequence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smoking</td>
<td>Nice nicotine hit</td>
<td>Lung cancer</td>
</tr>
<tr>
<td>Saving for retirement</td>
<td>Less money</td>
<td>More money</td>
</tr>
<tr>
<td>Exercise</td>
<td>Ouch</td>
<td>Nice abs!</td>
</tr>
<tr>
<td>Doughnuts</td>
<td>Mmm...</td>
<td>I’m not getting on that scale...</td>
</tr>
</tbody>
</table>

We have trouble with this...
Characteristics of a fraught decision:

- Benefits Now – Costs Later (or Costs Now – Benefits Later)
- Degree of Difficulty
- Frequency
- Feedback
- Knowing What You Like

Sometimes the changes are downright fraught.
Reason #6: We struggle with big and fuzzy things.
We think we are being clear...
Mental models and closets

An Expert Mental Model

A Novice Mental Model
The first time is the most difficult.

It seemed to take a lot longer on the way here.
• People personalize messages

We need to change everything.

Everything you are doing is wrong.

YOU are wrong.

And bad.

And your kid is ugly.

Reasons #7: People don’t like to hear their baby is ugly
It makes them defensive
How can we help them feel safe?

Maslow’s Hierarchy
Plus WiFi
IDENTIFYING GAPS

What stands between now and the glowing perfect future?
Should I go see World War Z on Saturday?

Duh. Zombies +5
Cheap Theater +3

Catching a red-eye Friday -4
Scary! -1
9:45 pm -2

Total +8
Total -7

Force Field Analysis

By Kurt Lewin
© Usable Learning 2013
Meet Linn

• Linn followed his old boss to a new company. His boss just got hired as the Director of User Experience for a company that makes medical record software.

• The company has never had actual UX designers before. Previously the software was designed by medical record experts working with programmers and a graphic designer.

• Linn is working with a group to update the record entry function, but he’s getting a lot of resistance to all his suggestions. He’s been told that they are already behind with the next features release, and there’s no time to involve users in the process.

• In particular, he’s been dealing with his nemesis, Carl. Carl is an old school medical records expert, who doesn’t really believe Linn can tell him anything about the medical record design.
• Gina is the product manager of one of the largest real estate search applications.

• They just released their next generation search application, which significantly redesigned the search process, and are currently running both versions.

• Customers who are subscribed to the first gen system do not have to switch to the next gen system, and are resistant because while the older system is horrible, it’s very familiar and comfortable horribleness for experienced (and vocal) power users.

Meet Gina
With 2-3 people at your table, take a change in your world and create a force field analysis.

Steps:

• 1) Identify driving and restraining forces
• 2) Rate each force from +/- 1-5 in strength
• 3) Total forces for each side.

Now you try
• “Reasons why they aren’t doing the right thing” checklist


Your special gift just for coming in today
LET’S TALK ABOUT GOALS

And why you aren’t going to change the whole culture (at least not right away)
Break it down
Breaking down GOALS

Image Credit – Sebastian Deterding
http://www.slideshare.net/dings/dont-play-games-with-me-promises-and-pitfalls-of-gameful-design

© Usable Learning 2013
If this is overwhelming...
Follow the Frog

[YouTube video link]

Follow the frog

[YouTube video link]
The magic question
• Shrink the change – what is a small, concrete action they can take?
• Can you create immediate, short-term and long-term goals for the change?
• What are the visible behaviors? Can we steer towards them?

Creating Goals
Linn followed his old boss to a new company. His boss just got hired as the Director of User Experience for a company that makes medical record software.

The company has never had actual UX designers before. Previously the software was designed by medical record experts working with programmers and a graphic designer.

Linn is working with a group to update the record entry function, but he’s getting a lot of resistance to all his suggestions. He’s been told that they are already behind with the next features release, and there’s no time to involve users in the process.

In particular, he’s been dealing with his nemesis, Carl. Carl is an old school medical records expert, who doesn’t really believe Linn can tell him anything about the medical record design.

Define Goals

1) Identify an overall goal
2) Identify smaller sub-goals that would support the overall goal
3) Identify some concrete behaviors that show the behaviors I want them to adopt UX design thinking as a philosophy.
Gina is the product manager of one of the largest real estate search applications.

They just released their next generation search application, which significantly redesigned the search process, and are currently running both versions.

Customers who are subscribed to the first gen system do not have to switch to the next gen system, and are resistant because while the older system is horrible, it’s very familiar and comfortable horribleness for experienced (and vocal) power users.

1) Identify an overall goal
2) Identify smaller sub-goals that would support the overall goal
3) Identify some concrete behaviors that show the behaviors

Define goals
With 2-3 people at your table, take a change in your world and define goals.

Steps:

• 1) Identify an overall goal
• 2) Identify smaller sub-goal that would support the overall goal
• 3) Identify some concrete behaviors that show the behaviors

Now you try
• How many psychologists does it take to change a lightbulb?

• Just one, but the lightbulb has to really want to change.

Okay....
WAYS TO MOTIVATE CHANGE

- Or – talking to the elephant
Knowledge vs. Belief

The rider *knows* things

But the elephant *believes*
Let's talk about visceral experiences


© Usable Learning 2013
Design for the elephant

http://www.youtube.com/watch?v=R0LCmStlW9E
© Usable Learning 2013
How do we create visceral experiences?
Technology Acceptance Model (TAM)

It’s about perception
Characteristics of Innovation

Everett Rogers, Diffusion of Innovations
The infamous QWERTY Keyboard
Ever seen the Dvorak Keyboard?
1. Relative Advantage
2. Compatibility
3. Complexity
4. Trialability
5. Observability

Let’s apply these to keyboards:
Social Proof
– or why I’m always overdressed in San Francisco
“Your income tax dollars are spent on services the we Minnesotans depend on [education, helping the needy, essential services, etc.] . When taxpayers do not pay what they owe, the entire community suffers.”

No discernible effect.

“According to a recent public opinion survey, many Minnesotans believe other people routinely cheat on their taxes. This is not true, however. Audits by the Internal Revenue Service show that people who file tax returns report correctly and pay voluntarily 93 percent of the income taxes they owe....”

Moderate effect overall & Significant effect in targeted population

http://www.socialnorms.org/CaseStudies/taxcompliance.php
If you are a middle school student:

Who are your opinion-leaders?
Who models the behavior?

- Short videos with rural farmers in India

http://opinionator.blogs.nytimes.com/2013/04/03/where-youtube-meets-the-farm/?_r=0
Enlisting them...
Green Initiative Success Stories

Employees in the Western Territory reduce paper use by 76% read more...

Employee spotlight: Joan S. sets up a community recycling program read more...

The IT group is using work-at-home days to reduce their carbon footprint read more...

Opinion Leaders, Testimonials, Success Stories
Types of Adopters

- Innovators
- Early Adopters
- Early Majority
- Late Majority
- Laggards

- From Diffusion of Innovations by Everett Rogers
Chasm

- Innovators
- Early Adopters
- Early Majority
- Late Majority
- Laggards

Innovation Chasm

- From Crossing the Chasm – Geoffrey A Moore

© Usable Learning 2013
Some people are just stubborn
• Are you dealing with a conflict or a problem?

• Can you make them feel safe / respected / included?

• Can you say “Yes, and…”

• Is there something you *should* be hearing here?

Dealing with difficult
Do they have self-efficacy?

- Mindset, by Carol Dweck

© Usable Learning 2013
MAKING IT HAPPEN

Steps for action
1/ Knowledge Stage
2/ Persuasion Stage
3/ Decision Stage
4/ Implementation Stage
5/ Confirmation Stage

Innovation Decision Process

- From Diffusion of Innovations by Everett Rogers
© Usable Learning 2013
Avoid cycles of failure
Create opportunities to practice
Self-confirmation bias

I’m saying this out loud so I must think it’s true!
Sunk cost investment
• Can I put a sign in your yard?

Start small
• What does the feedback loop look like?
• How do they know they are doing well?

Feedback
1. Can they viscerally experience the need for change?

2. Can they see utility and ease of use?

3. How do they observe others? Who are they seeing?

4. How do they dip their toe in? How can they safely and positively try it out?

5. How do they have autonomy and control? How do they feel safe?

6. How are they getting feedback?

Making Change Happen
Now you try

Take your change, and address the six questions:

1) Make it real: Can they viscerally experience the need for change?
2) Can they see utility and ease of use?
3) How do they observe others? Who are they seeing?
4) How do they dip their toe in? How can they safely and positively try it out?
5) How do they have autonomy and control? How do they feel safe?
6) How are they getting feedback?
REINFORCING AND MAINTAINING

Change is sloooooooooooooow
Fix the environment
Environment Matters
Make it easy for people to succeed
Create an environment that supports them
Change is a process, not an event.

I need to get this on a coffee mug.
…it’s just hard

Sometimes it’s not complicated...

Successful change looks like this

“This isn’t WORKING!”
#despair

Time >
• Then do it again:

Force Field Analysis

1) Identify driving and restraining forces
2) Rate each force from +/-1-5 in strength
3) Total forces for each side.

Identify Goals

1) Identify an overall goal
2) Identify smaller sub-goal that would support the overall goal
3) Identify some concrete behaviors that show the behaviors

Planning Questions

1. Make it real: Can they viscerally experience the need for change?
2. Can they see utility and ease of use?
3. How do they observe others? Who are they seeing?
4. How do they dip their toe in? How can they safely and positively try it out?
5. How do they have autonomy and control? How do they feel safe?
6. How are they getting feedback?

We still have time?
Julie Dirksen

julie@usablelearning.com
Twitter: usablelearning

Design For How People Learn

Questions?
• Haidt, Jonathan, The Happiness Hypothesis (book)
• Gery, Gloria, Electronic Performance Support Systems (book)
• Thaler, Richard and Sustein, Cass. Nudge (book)
• Norman, Donald, The Design of Everyday Things (book)
• reene and Paxton, Patterns of Neural Activity Associated with Honest and Dishonest Moral Decisions, PNAS 106:12506-12511 (July 28, 2009).
• Prochaska, JO; Norcross, JC; DiClemente, CC. Changing for good: the revolutionary program that explains the six stages of change and teaches you how to free yourself from bad habits. New York: W. Morrow; 1994
• Rogers, Everett Diffusion of Innovations (book)
**Force Field Analysis**

1) Identify driving and restraining forces
2) Rate each force from +/- 1-5 in strength
3) Total forces for each side.

**Identify Goals**

1) Identify an overall goal
2) Identify smaller sub-goal that would support the overall goal
3) Identify some concrete behaviors that show the behaviors

**Planning Questions**

1. Make it real: Can they viscerally experience the need for change?
2. Can they see utility and ease of use?
3. How do they observe others? Who are they seeing?
4. How do they dip their toe in? How can they safely and positively try it out?
5. How do they have autonomy and control? How do they feel safe?
6. How are they getting feedback?