Strategy for Change Management

Why is change so ***&%$#@*%*** hard?

Why I care about this

- 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.

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A Few Disclaimers

- 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.

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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.
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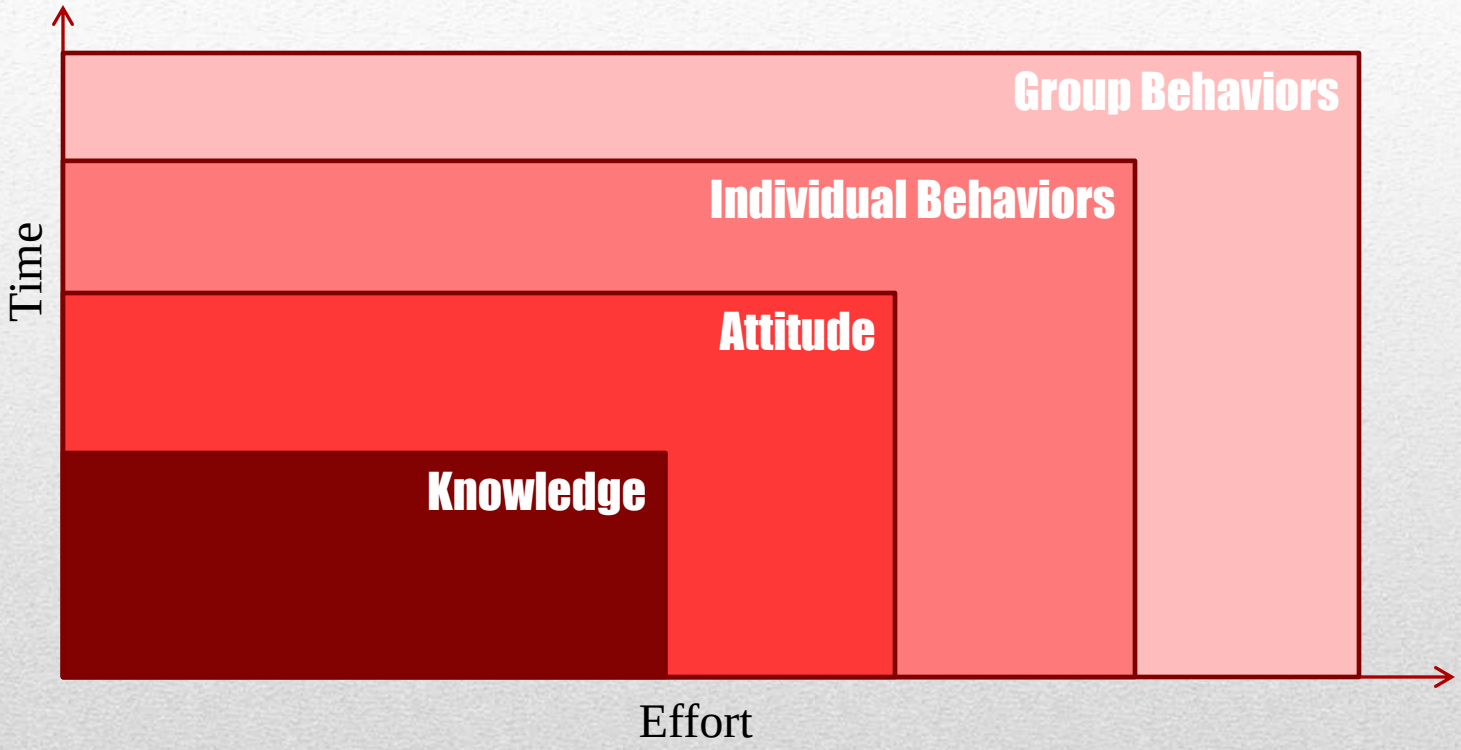
WHY *IS* CHANGE SO &%$#@*% HARD?

Change Progression



Change process

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- 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

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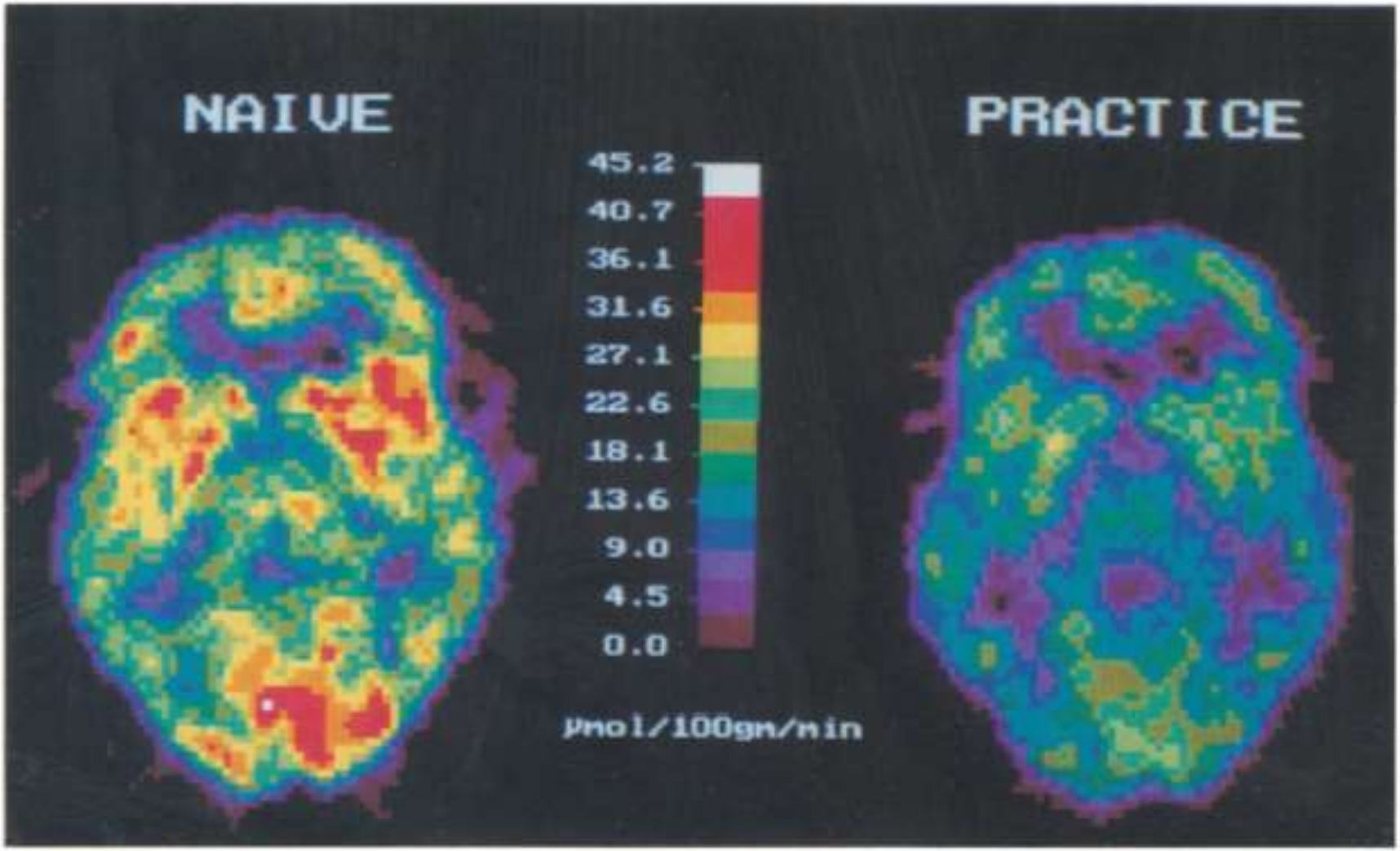

Fig. 6. PET images (41% atlas slice) of a subject in naive and practiced conditions, showing decreases in GMR.

Glucose Metabolic Rate after several weeks of Tetris Practice

- (Haier et al 1992)

© Usable Learning 2013

When you are used to this...

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or

Reason #2: Cognitive Load

- Shiv and Fedorikhin 1999 - Heart and Mind in Conflict: The Interplay of Affect and Cognition in Consumer Decision Making

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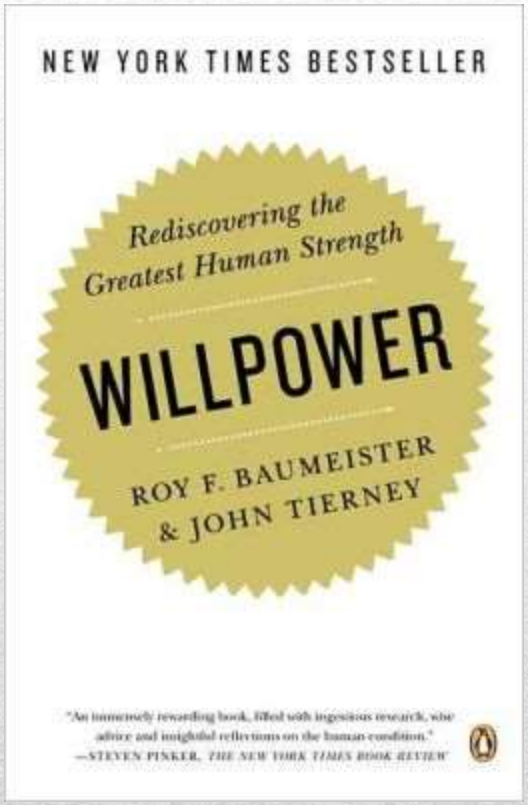

Willpower and Ego Depletion

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Reason #3: Rational Decision Making

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

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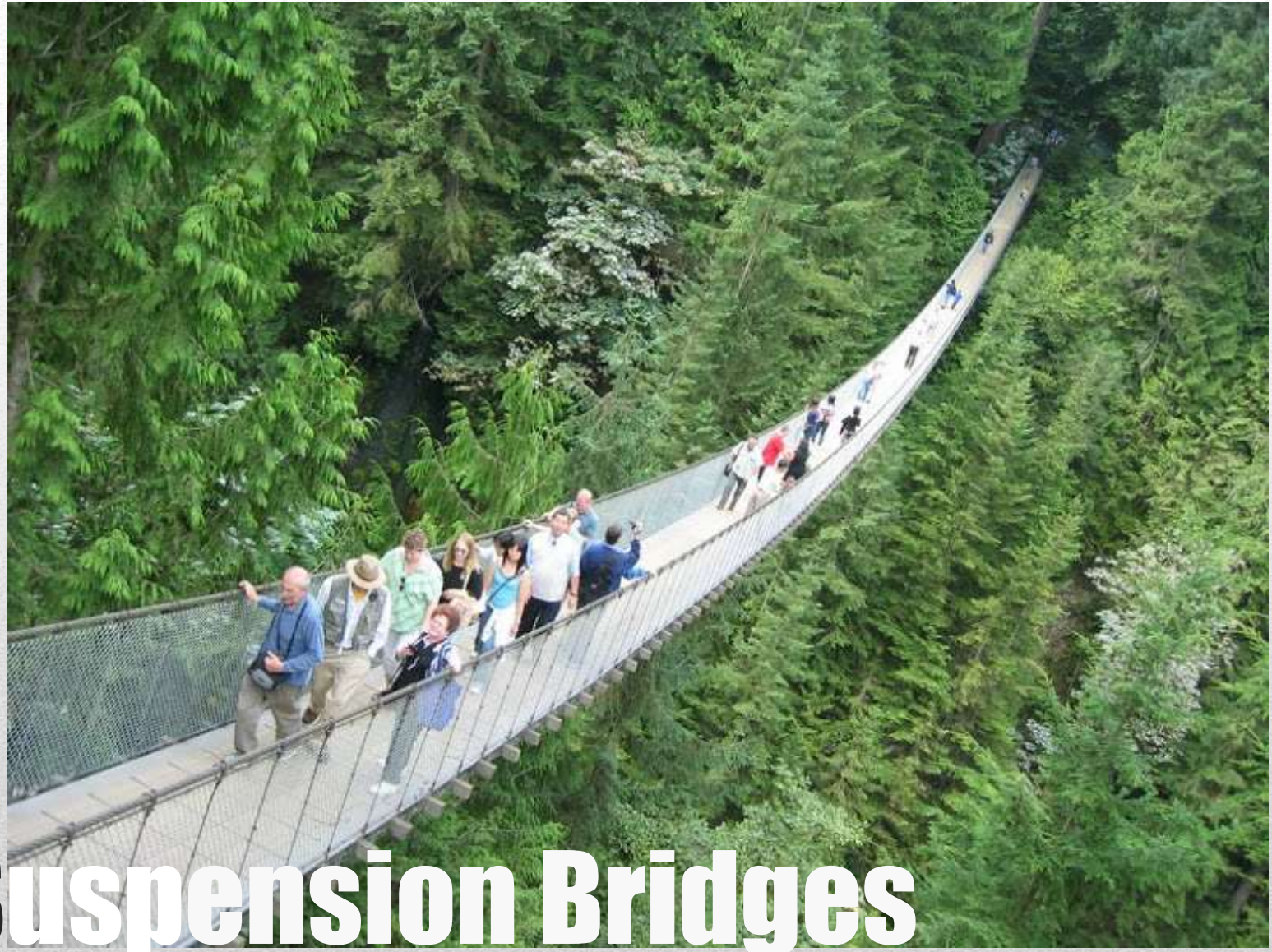


Suspension Bridges

http://gaius.fpce.uc.pt/niips/novoplano/ps1/documentos/dutton&aron1974.pdf

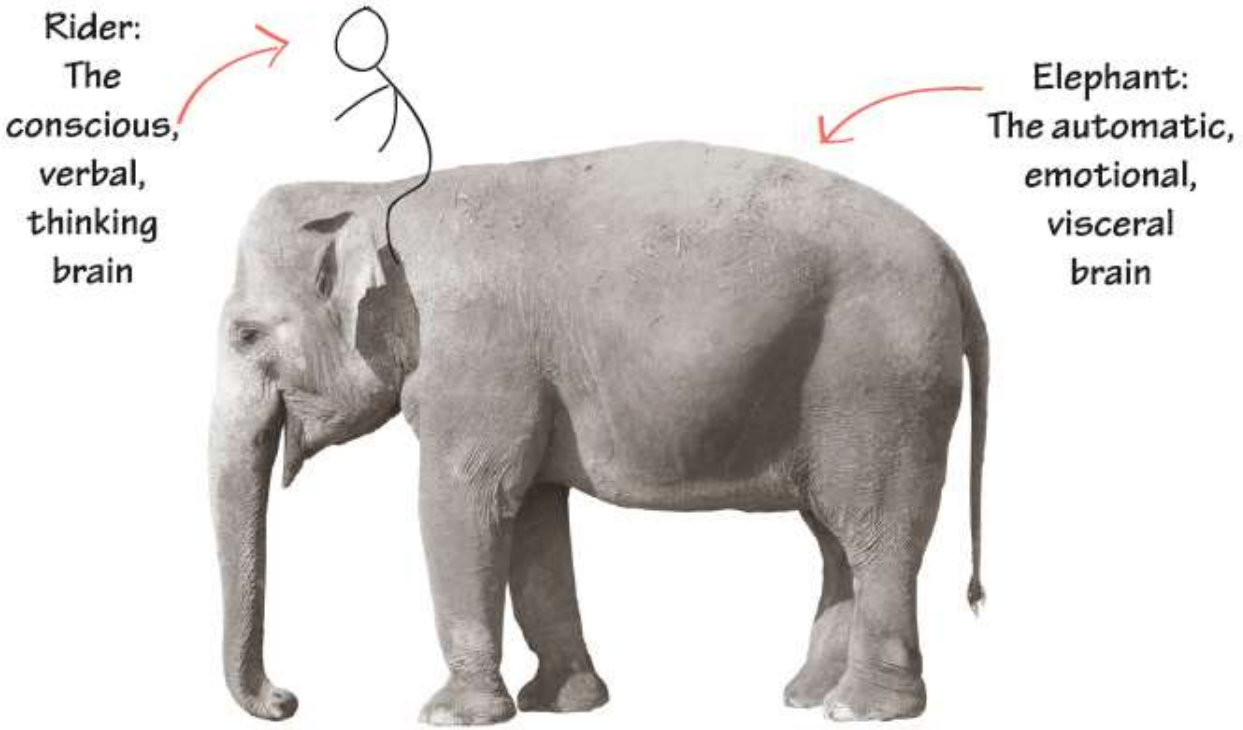
Photo by Mike Taylor

© Usable Learning 2013

Y’know, I just like the *feel* of no-load mutual funds…

We struggle without that emotional tug

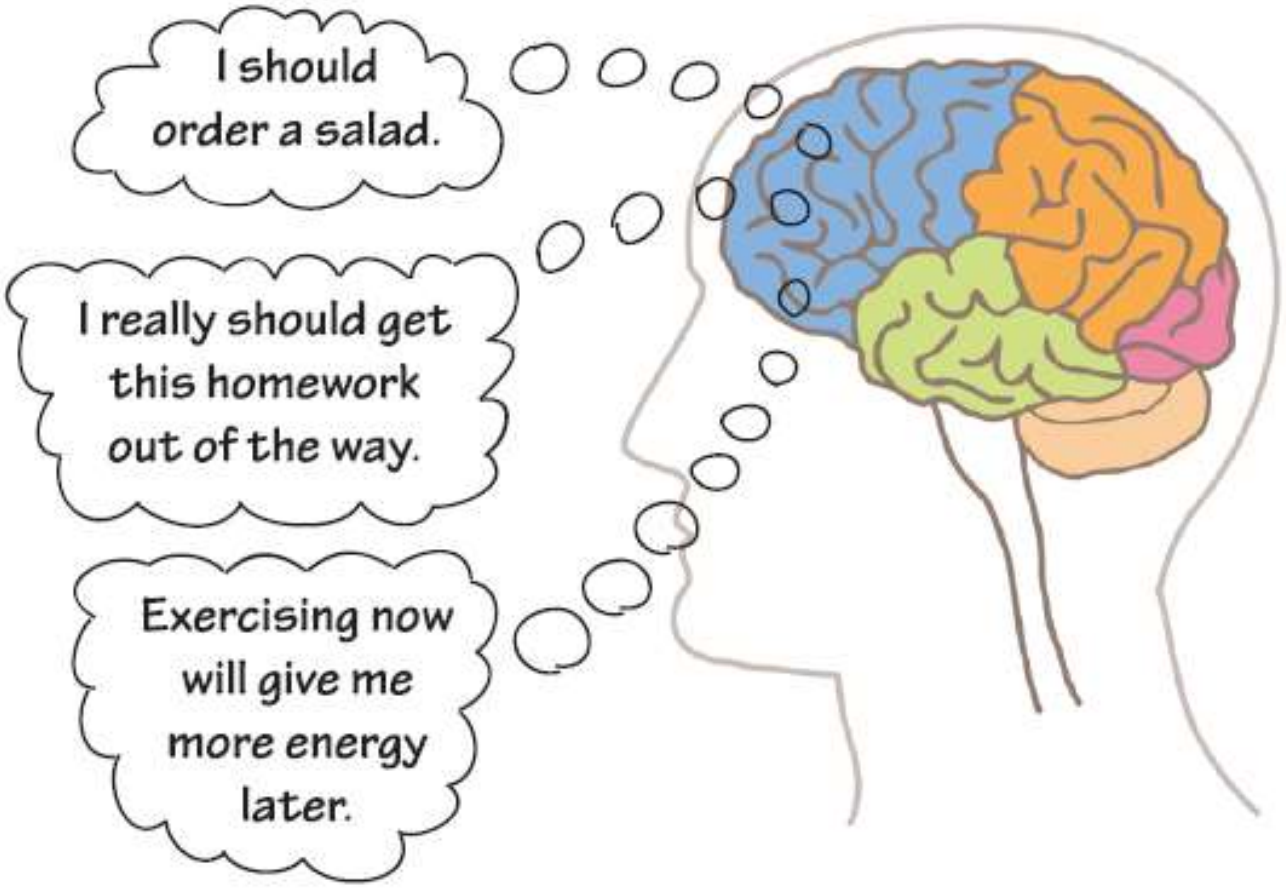
© Usable Learning 2013



The emotional element is elephant-sized

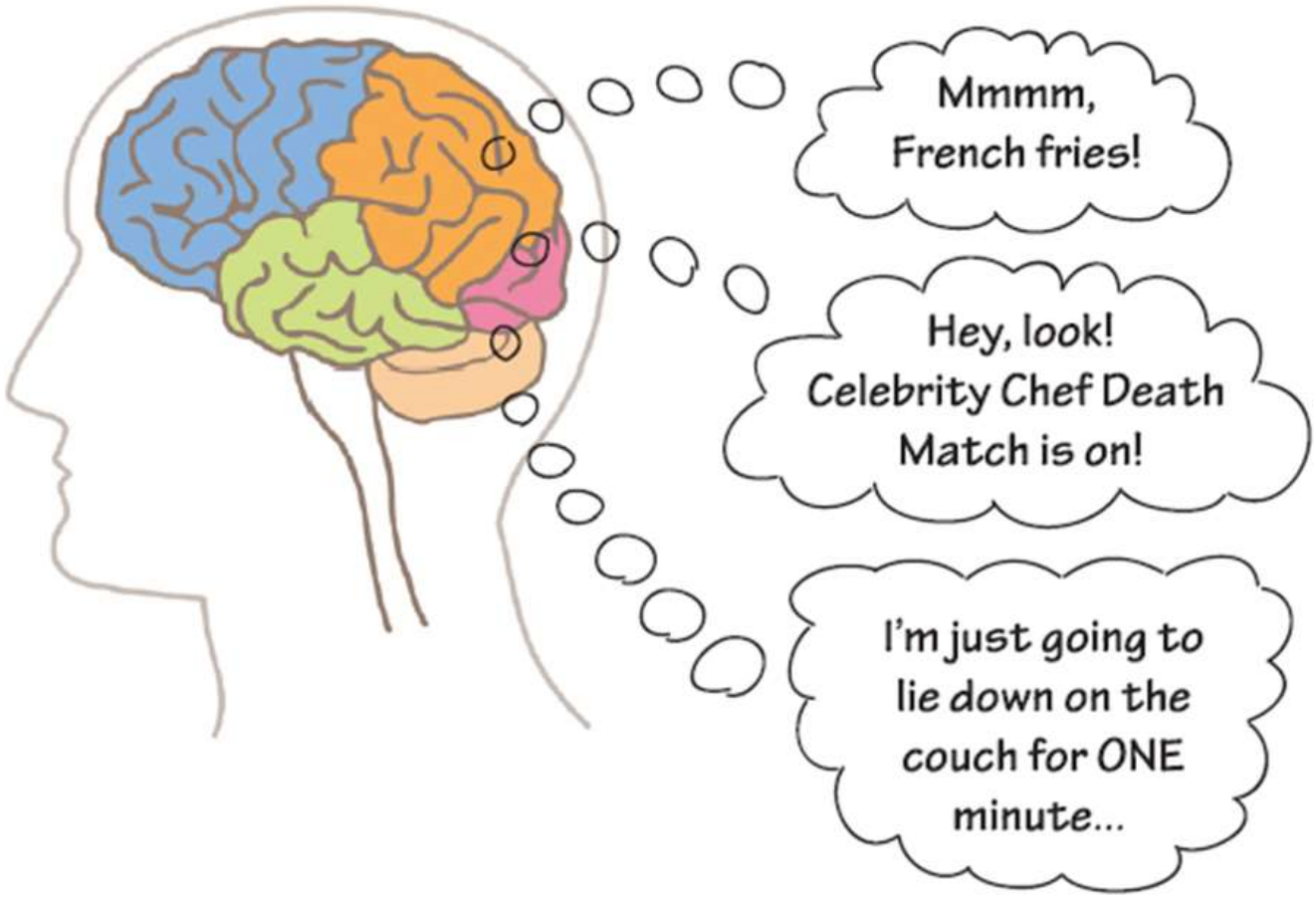
Jonathan Haidt, The Happiness Hypothesis

© Usable Learning 2013



The Rider

© Usable Learning 2013



The Elephant

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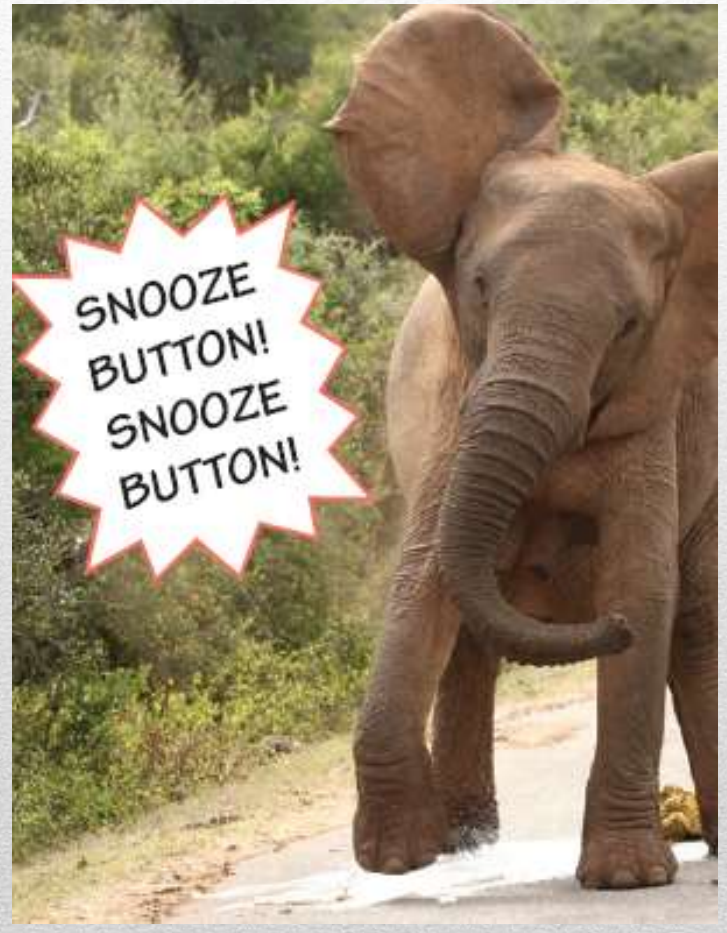
So, when there's a conflict...

Who do you think wins?



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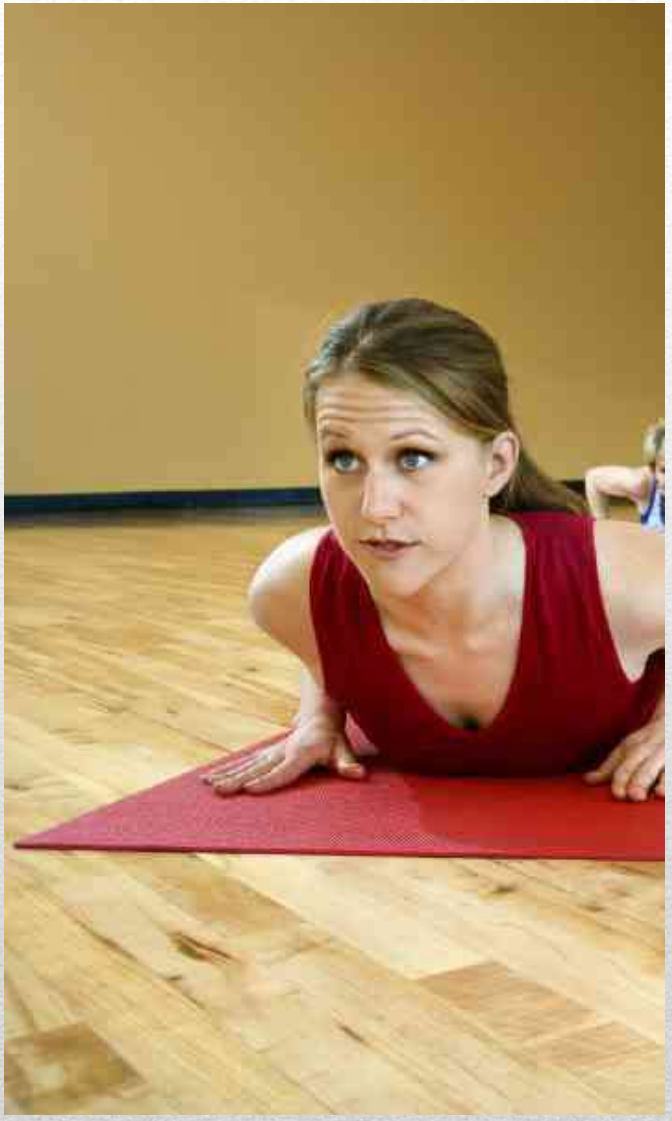
Meet my friend Sandra:



Reason #4: The Elephant isn't stupid

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…why would somebody want to repeat it?

If the initial experience is bad…

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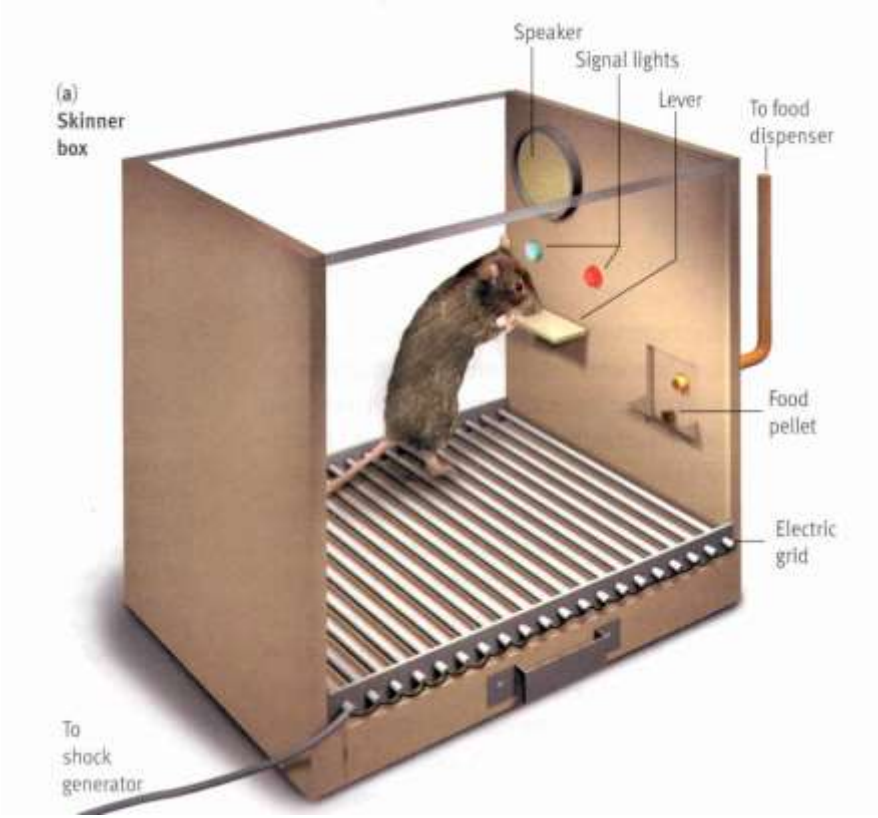

Behavioral Reinforcment

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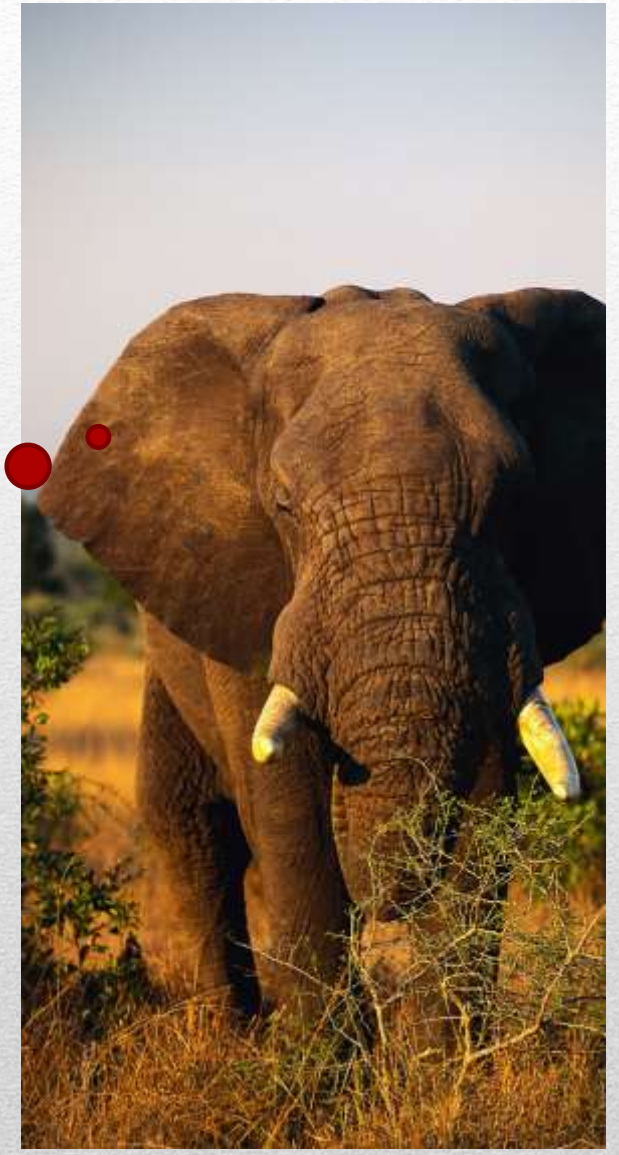
The elephant cares about what's happening *right now*.



Reason #5: Immediacy

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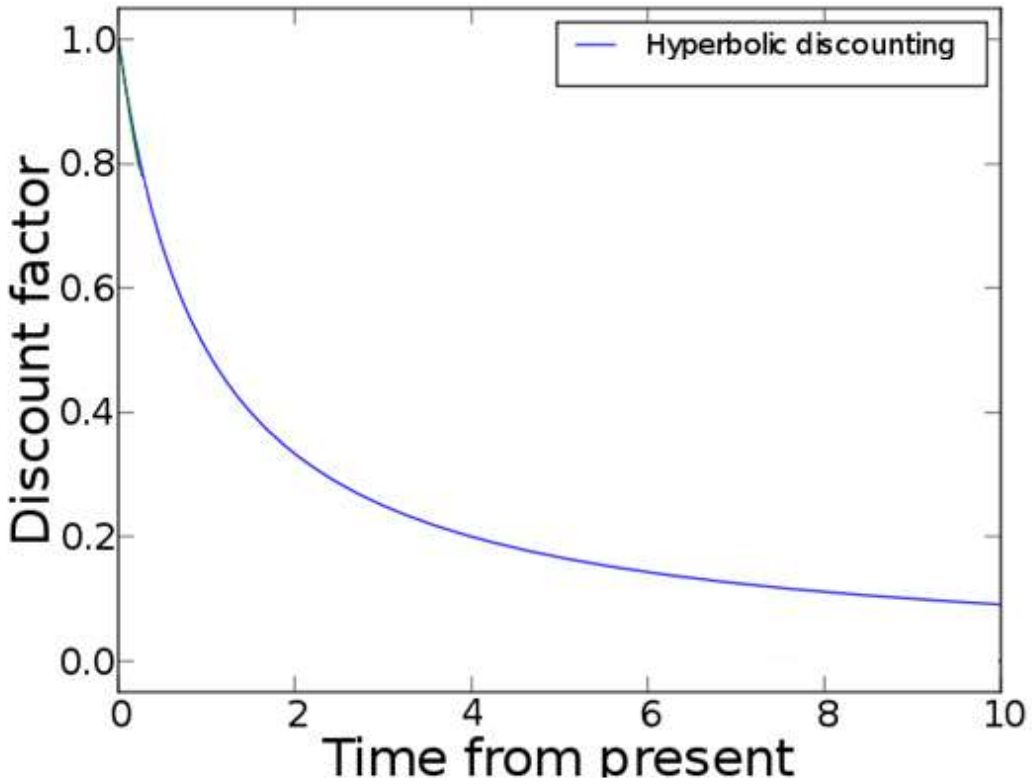

And the future is soooooo far away...

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Classic "I know, but..." activities

Activity	Immediate consequence	Delayed consequence
Smoking	Nice nicotine hit	Lung cancer
Saving for retirement	Less money	More money
Exercise	Ouch	Nice abs!
Doughnuts	Mmm...	I'm not getting on that scale...

We have trouble with this...

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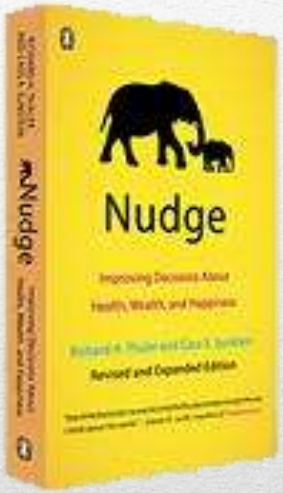
Characteristics of a fraught decision:

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



Sometimes the changes are downright fraught

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Reason #6: We struggle with big and fuzzy things.

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http://www.condenaststore.com/-sp/A-policeman-giving-directions-has-a-clear-mental-image-of-them-but-the-ma-New-Yorker-Cartoon-Prints_i8562959_.htm

We think we are being clear...

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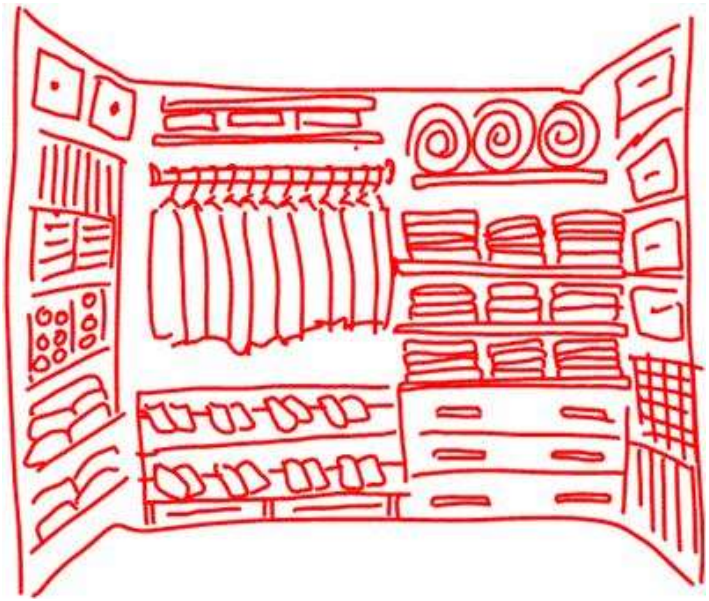
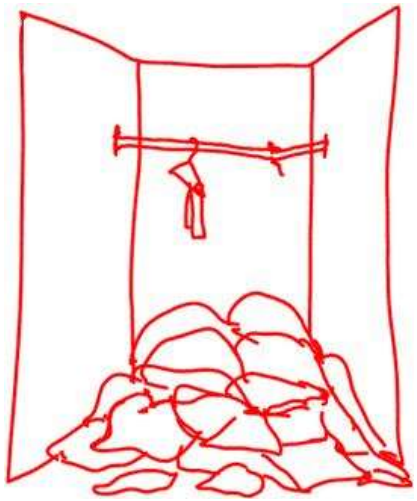
Mental **models and closets**



An Expert Mental Model



A Novice Mental Model

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The first time is the most difficult.

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- People personalize messages

Reasons #7: People don't like to hear their baby is ugly

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It makes them defensive

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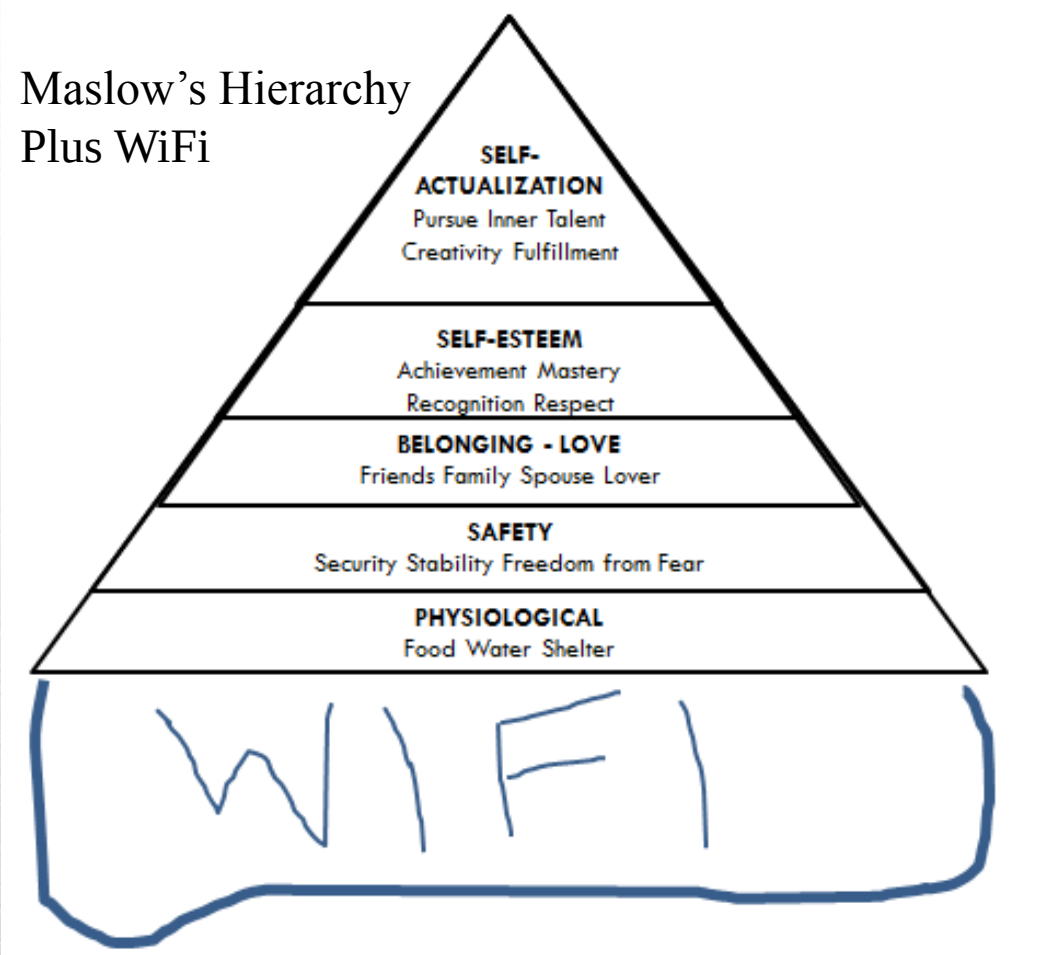

How can we help them feel safe?

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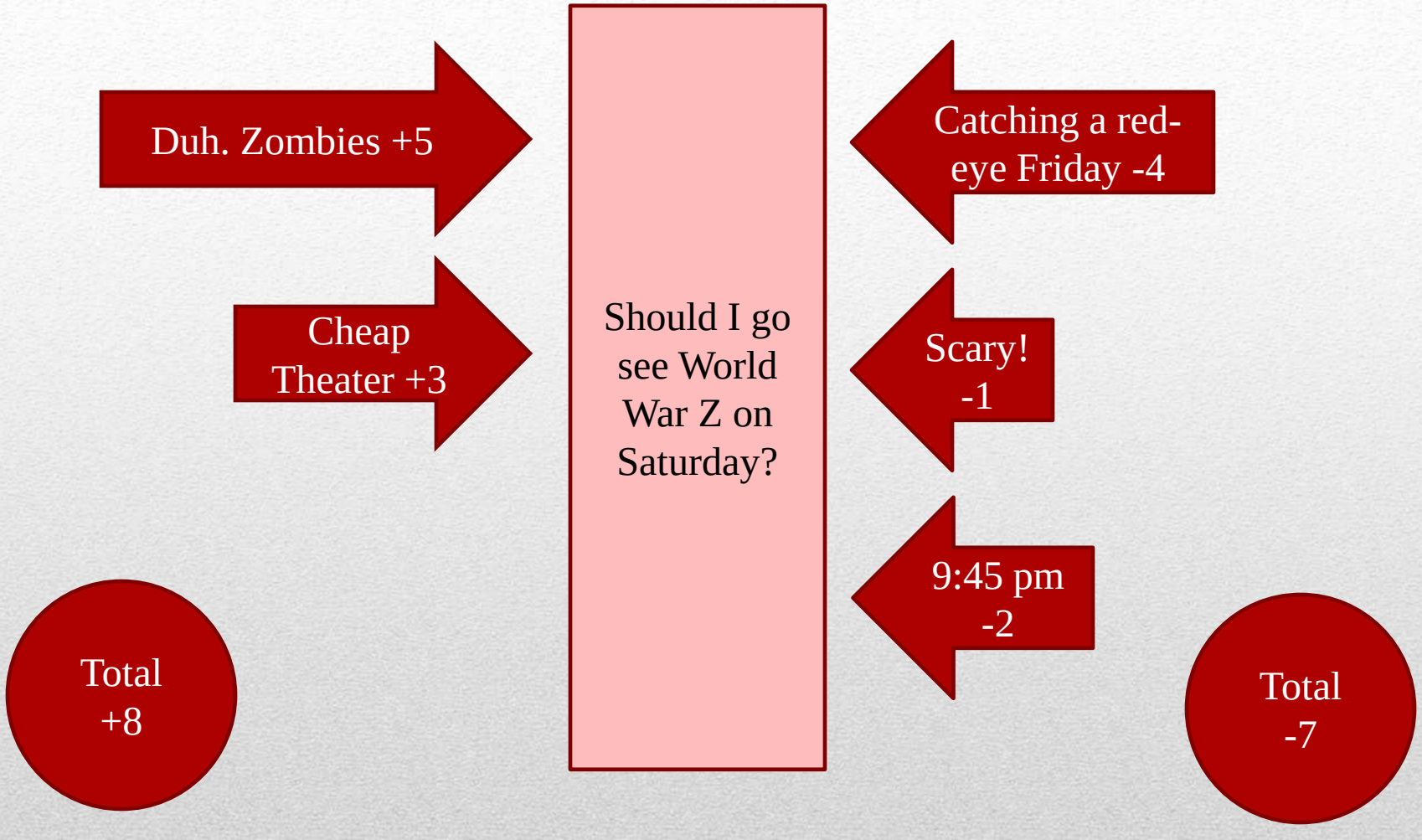
IDENTIFYING GAPS

What stands between now and the glowing perfect future?



Force Field Analysis

By Kurt Lewin

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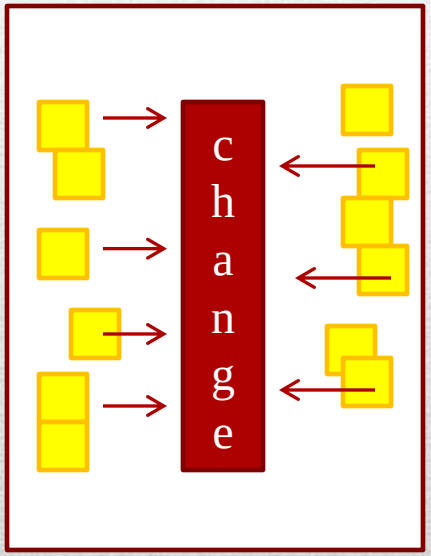
With 2-3 people at your table, take a change in your world and create a force field analysis.

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

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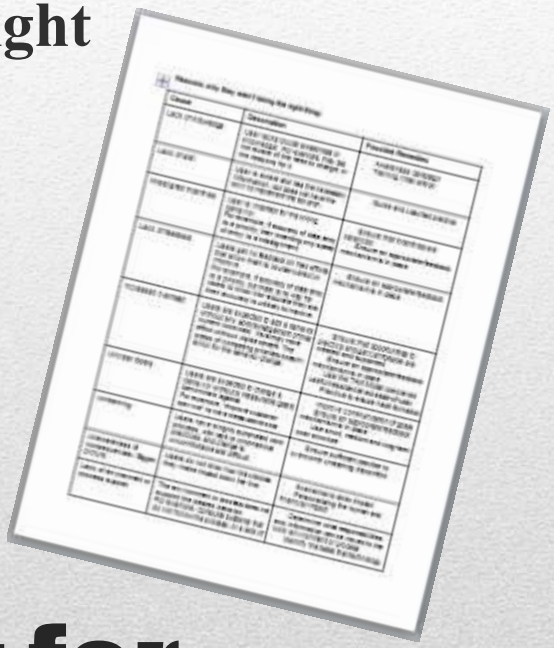
- "**Reasons why they aren't doing the right thing**" checklist

- http://bit.ly/rightthinglist



Your special gift just for coming in today

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LET'S TALK ABOUT GOALS

And why you aren't going to change the whole culture (at least not right away)

Break it down

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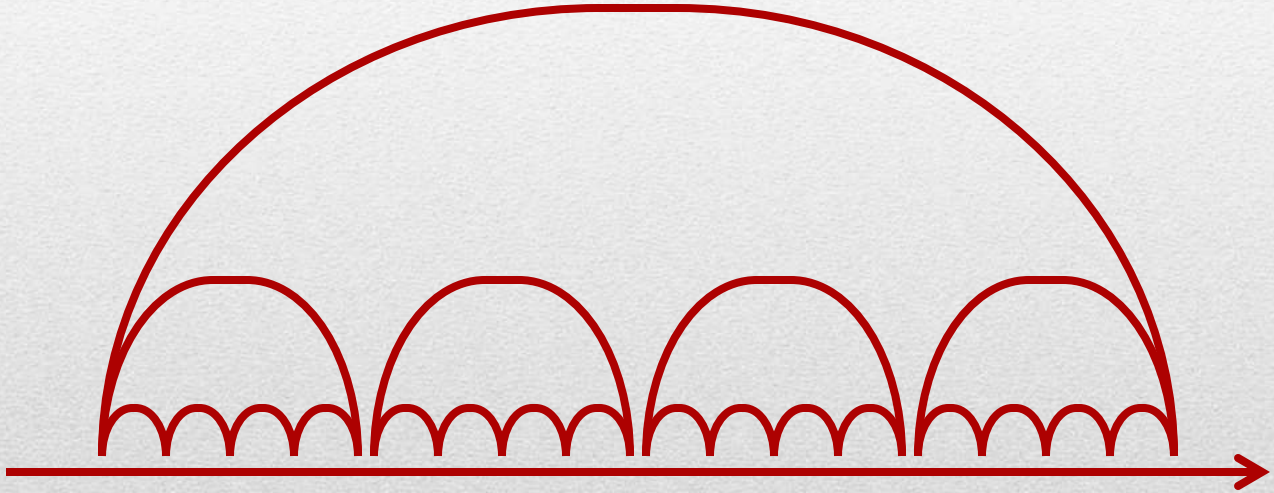

Breaking down GOALS

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

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If this is overwhelming…

© Usable Learning 2013

Follow the frog

http://www.youtube.com/watch?v=3iIkOi3srLo

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The magic question

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Creating Goals

- 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?

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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

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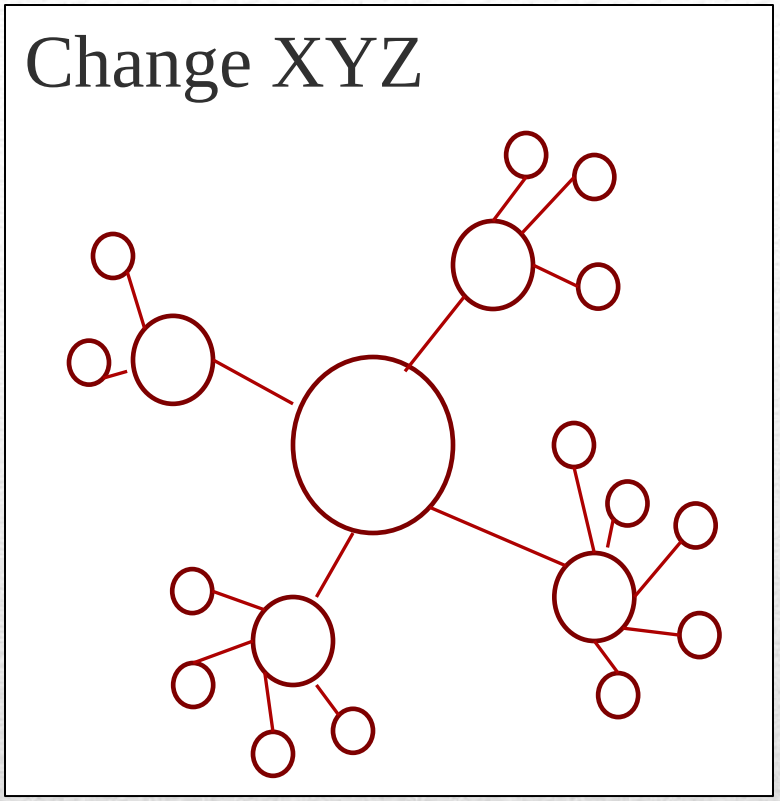

Now you try

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- How many psychologists does it take to change a lightbulb?

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

Okay....

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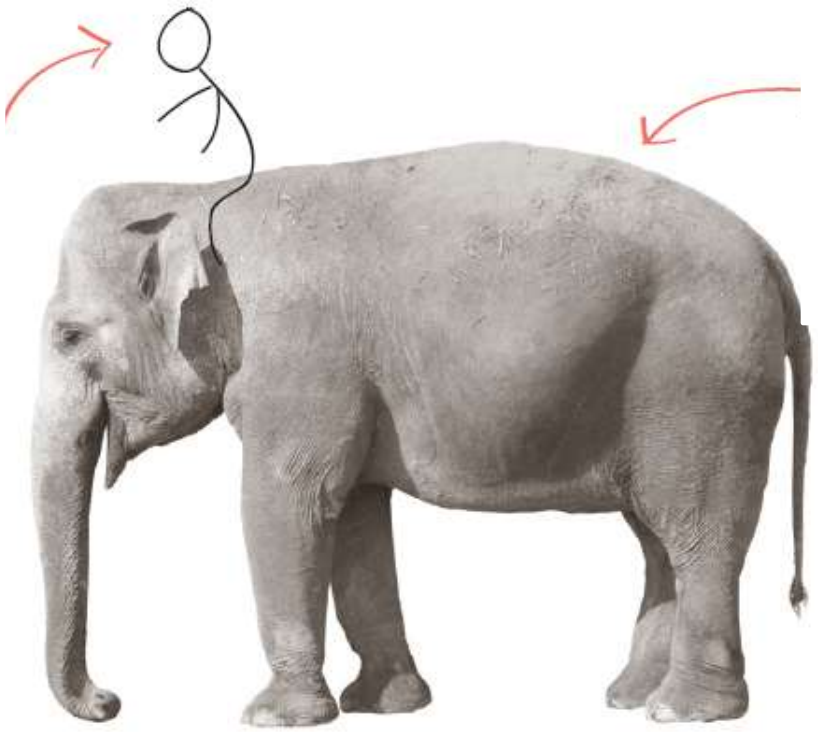
WAYS TO MOTIVATE CHANGE

- Or – talking to the elephant

The rider *knows* things



But the elephant *believes*

Knowledge vs. Belief

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Let's talk about visceral experiences

http://vhil.stanford.edu/pubs/2011/VHIL-technical-report.pdf

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Design for the elephant

http://www.youtube.com/watch?v=R0LCmStIw9E

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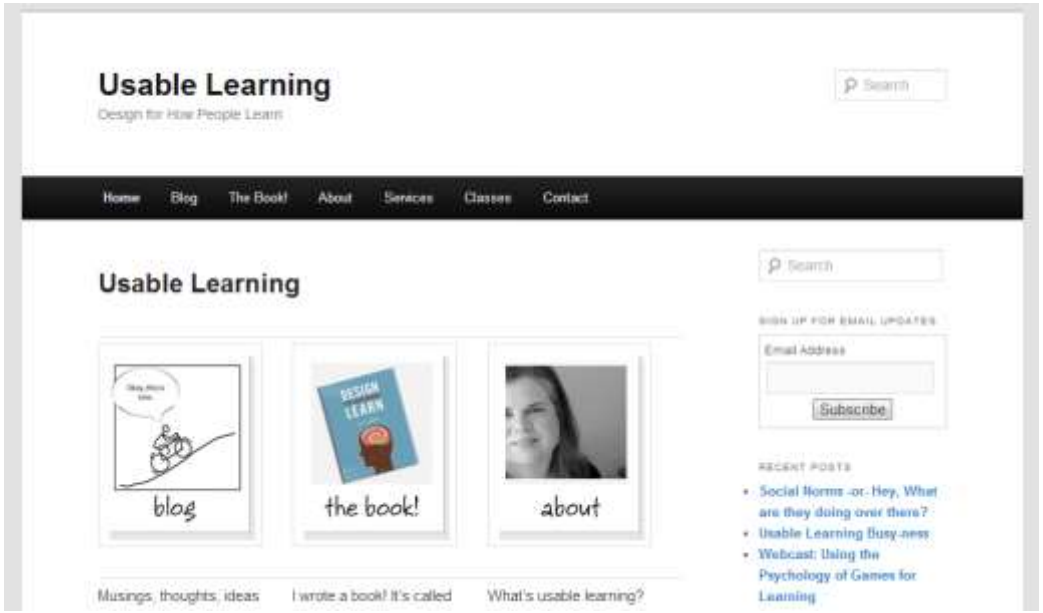
User Testing



How do we create visceral experiences?

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Technology Acceptance Model (TAM)

It's about perception

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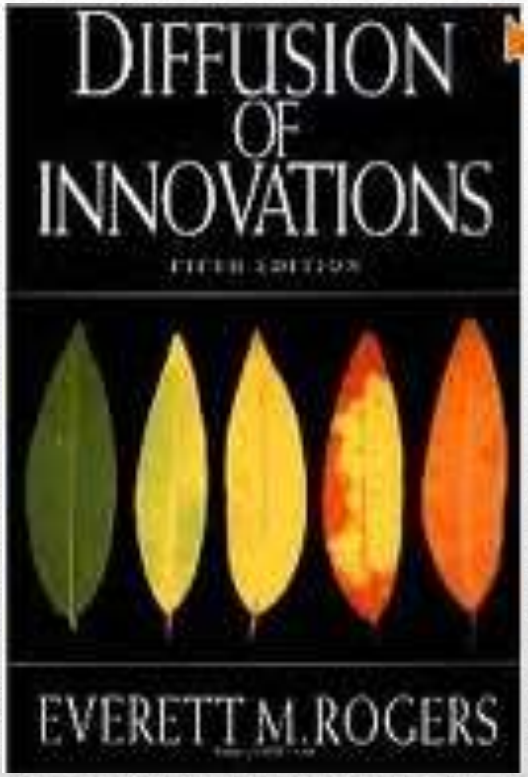
- Relative Advantage
- Compatibility
- Complexity
- Trialability
- Observability



Characteristics of Innovation

Everett Rogers , Diffusion of Innovations

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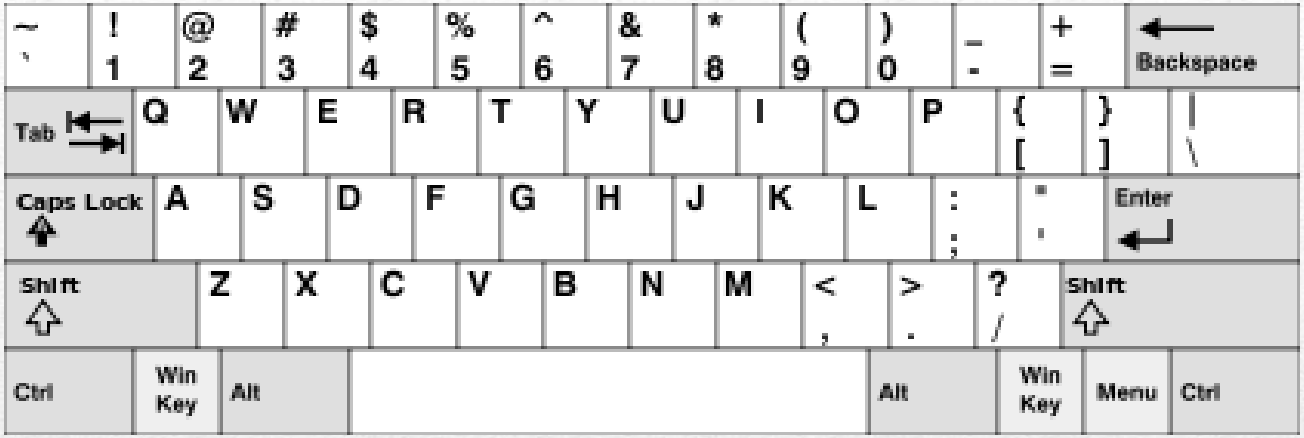

The infamous QWERTY Keyboard

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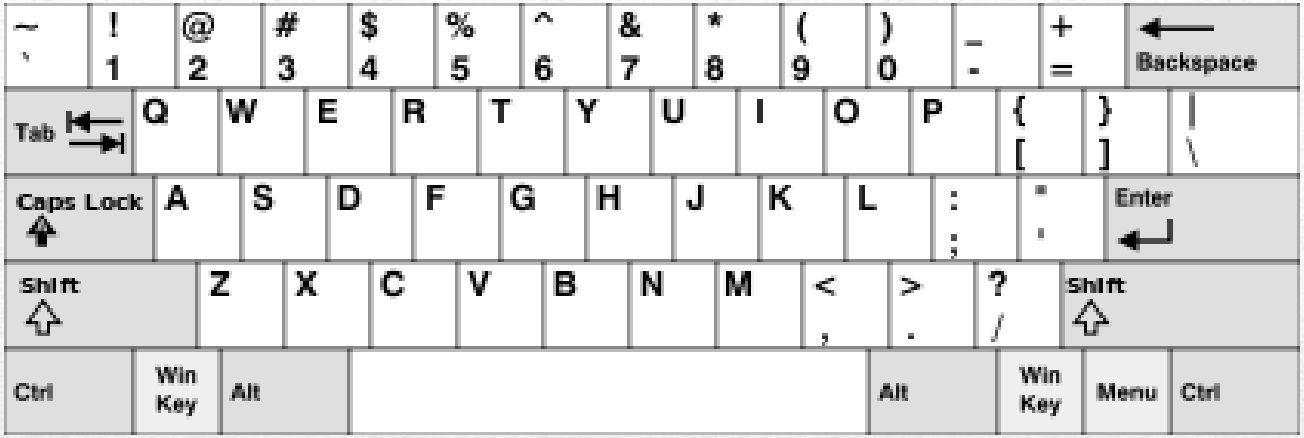

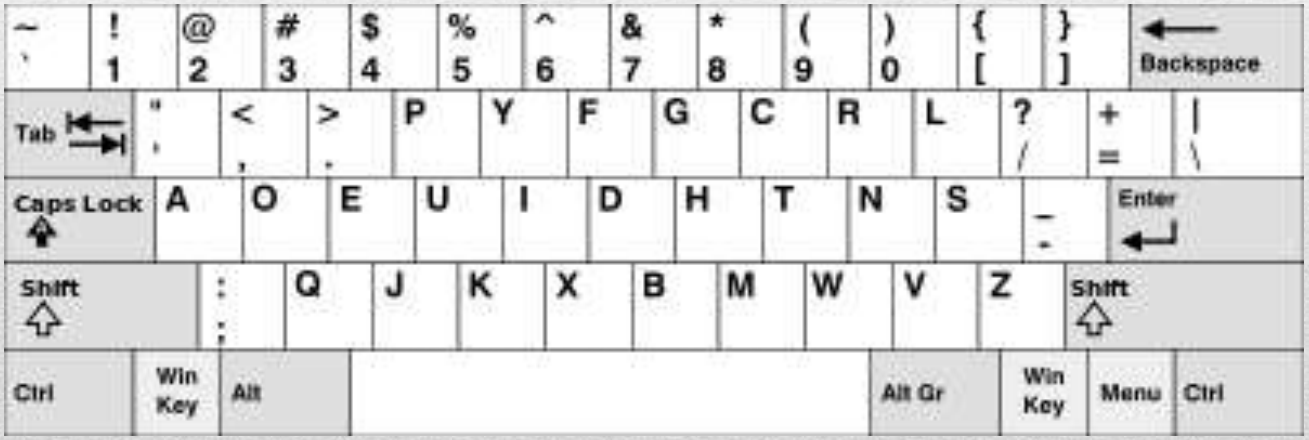

Ever seen the Dvorak Keyboard?

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1. Relative Advantage
2. Compatibility
3. Complexity
4. Trialability
5. Observability

Let's apply these to keyboards:

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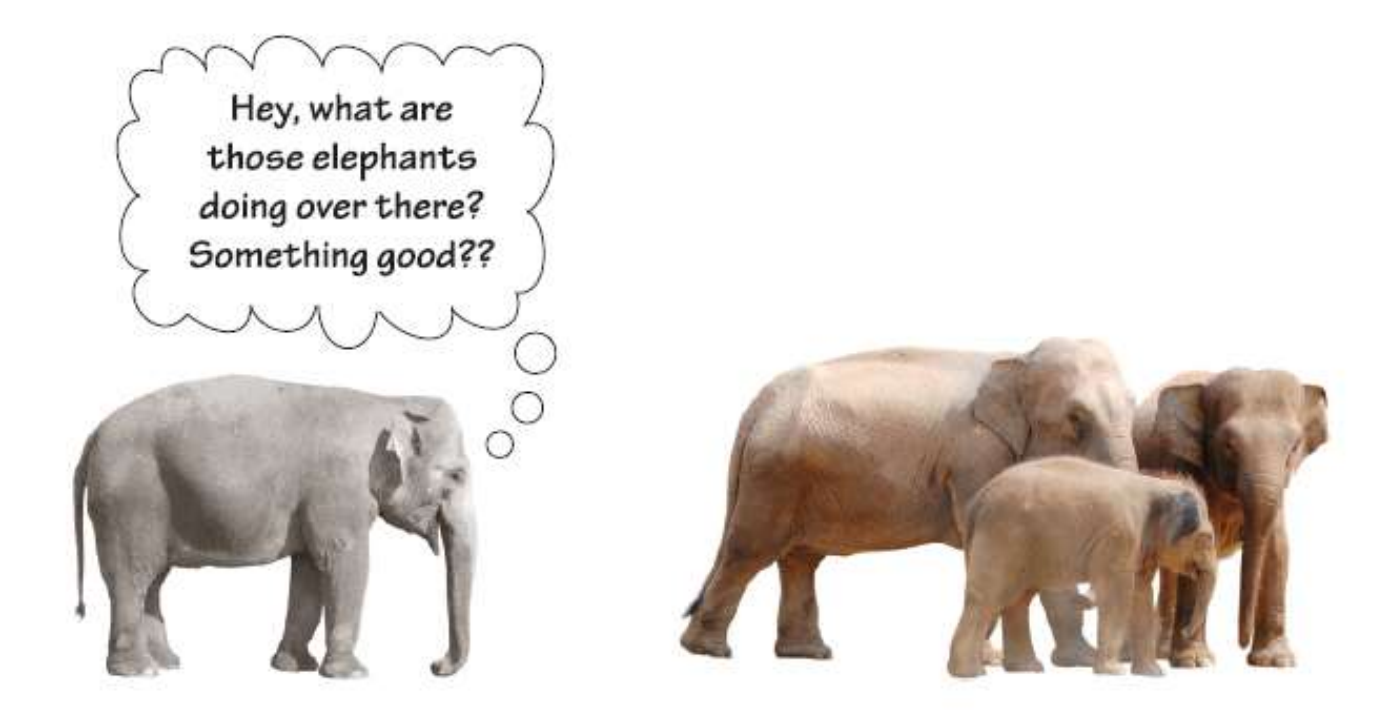

Social Proof

– or why I'm always overdressed in San Francisco

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Message 1

"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.

Message 2

" 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

Social Norms

http://www.socialnorms.org/CaseStudies/taxcompliance.php

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If you are a middle school student:

Who are your opinion-leaders?

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- Short videos with rural farmers in India

Who models the behavior?

http://opinionator.blogs.nytimes.com/2013/04/03/where-youtube-meets-the-farm/?_r=0

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Enlisting them…

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Opinion Leaders, Testimonials, Success Stories

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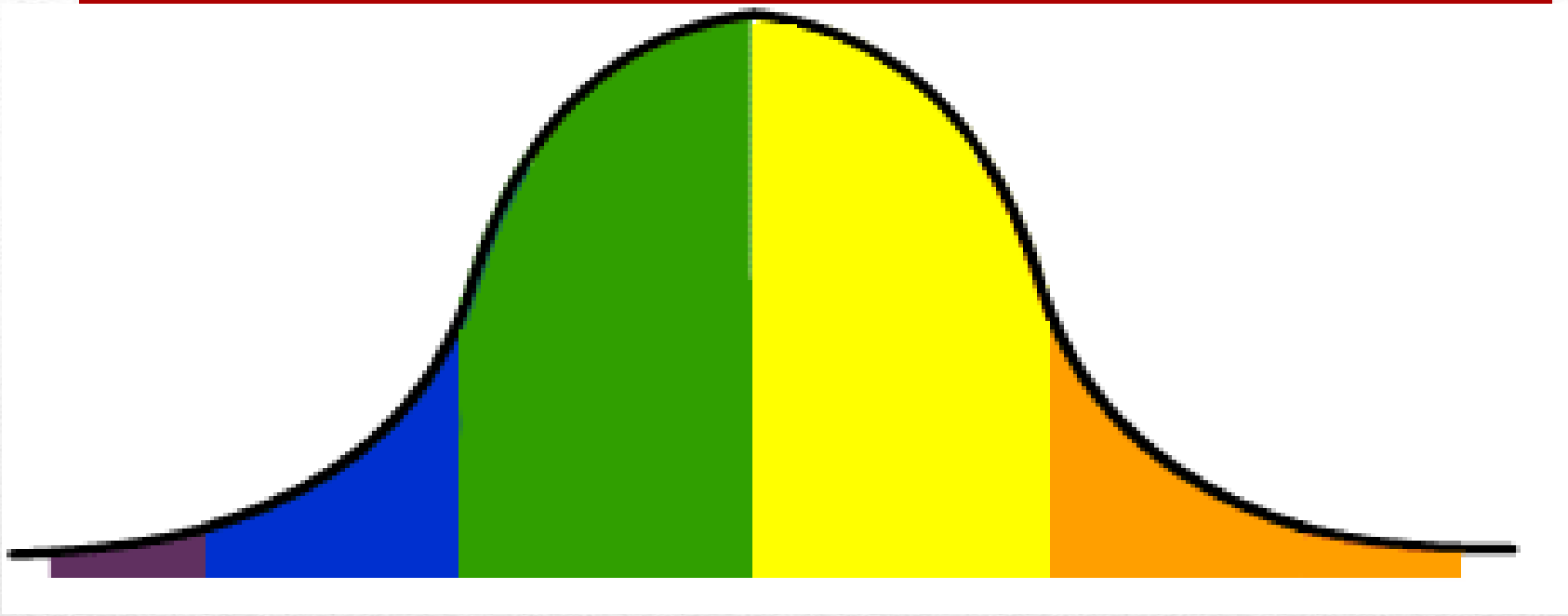

Types of Adopters

- From Diffusion of Innovations by Everett Rogers

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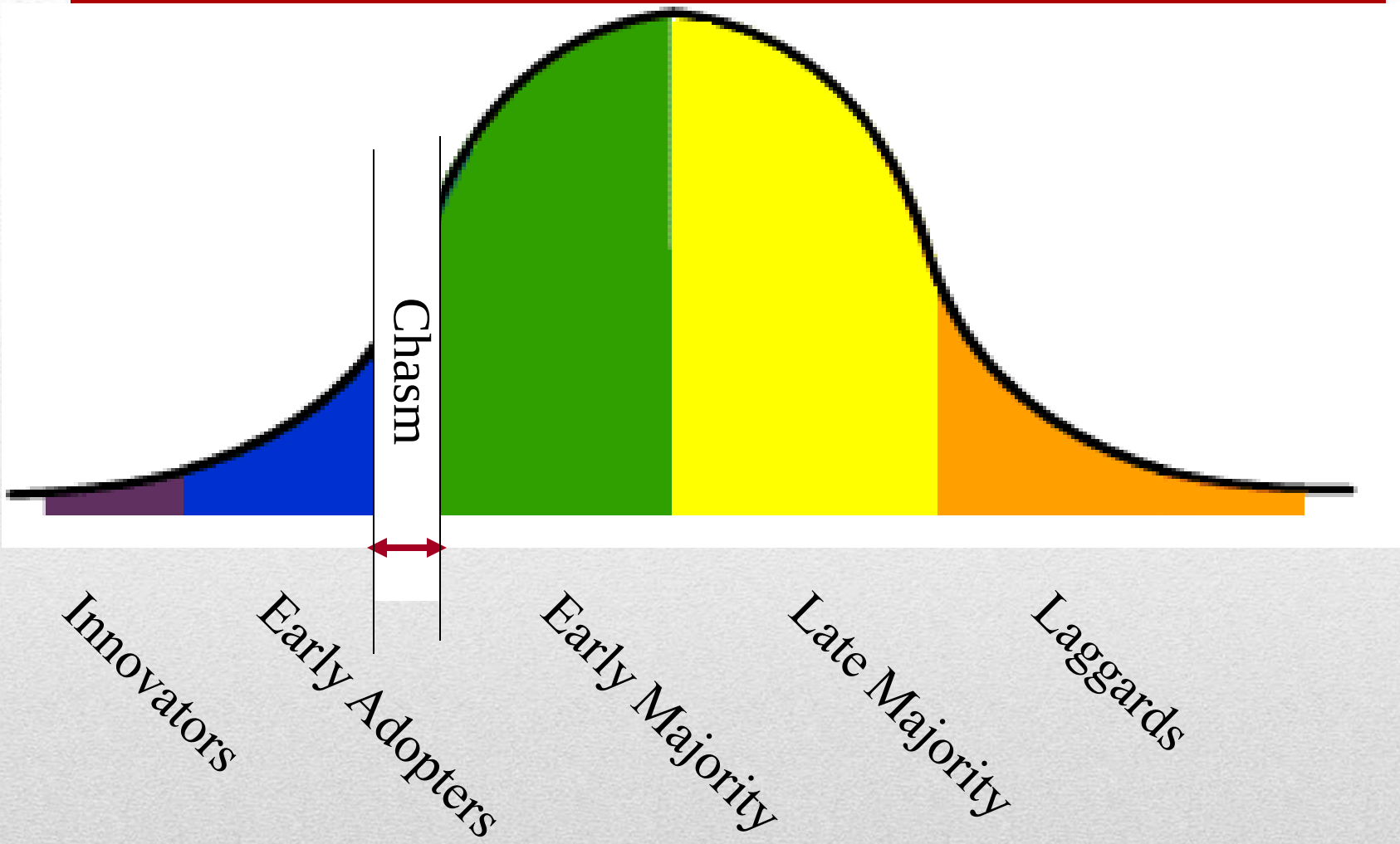

Innovation Chasm

- From Crossing the Chasm – Geoffrey A Moore

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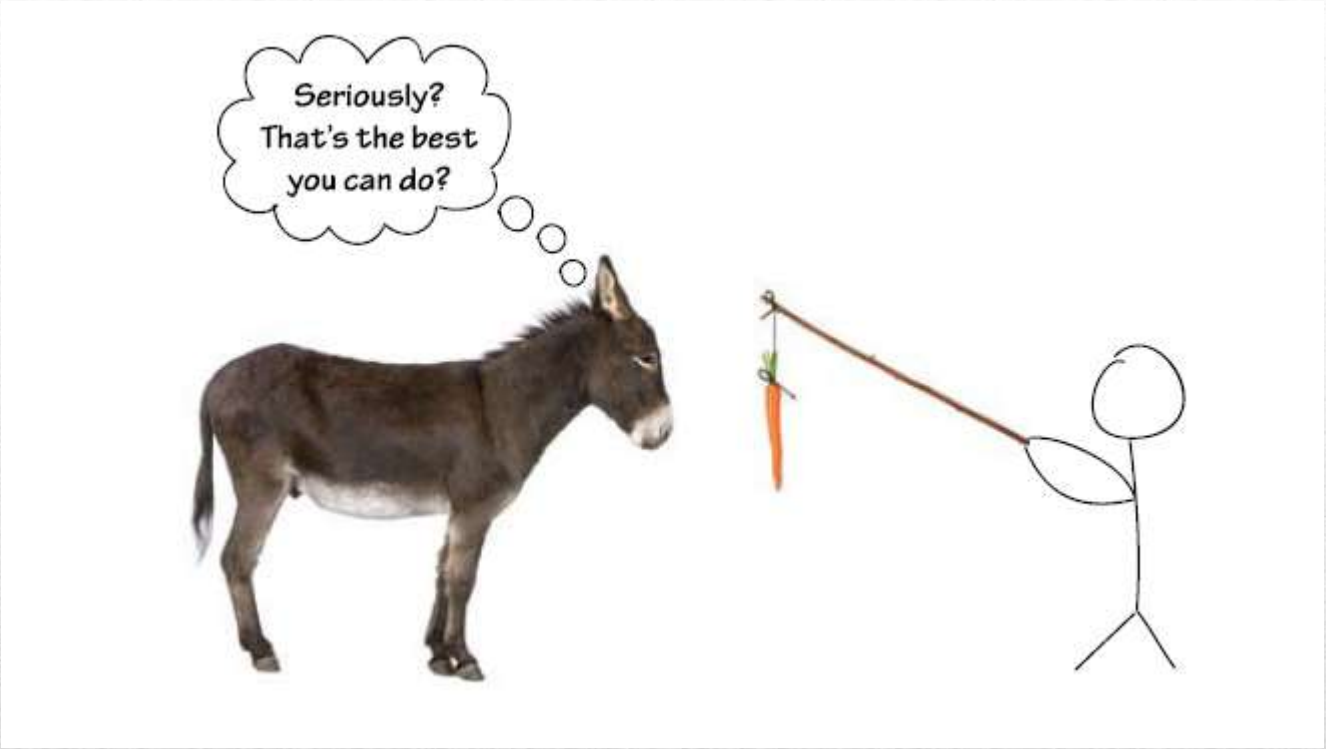

Some people are just stubborn

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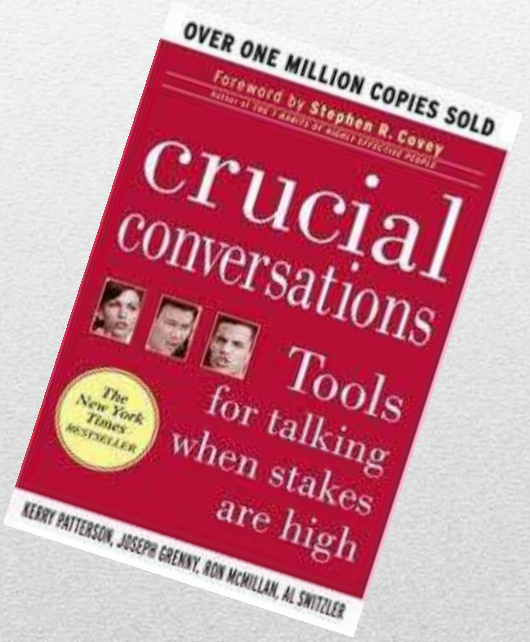
- Are you dealing with a conflict or a problem?
- Can you make them feel safe / respected / included?
- Can you say “Yes, and…”
- Is there something you *should* be hearing here?



Dealing with difficult

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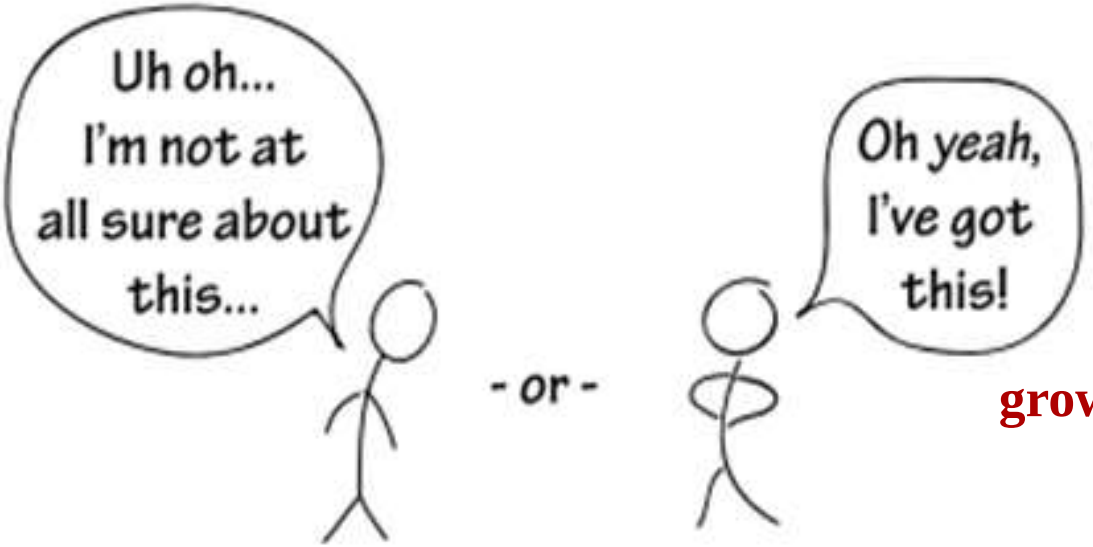
How do your users feel?

done too

no control

fixed mindset



I do

in control

growth mindset

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

Meet people where they are

Innovation Decision Process

- From Diffusion of Innovations by Everett Rogers

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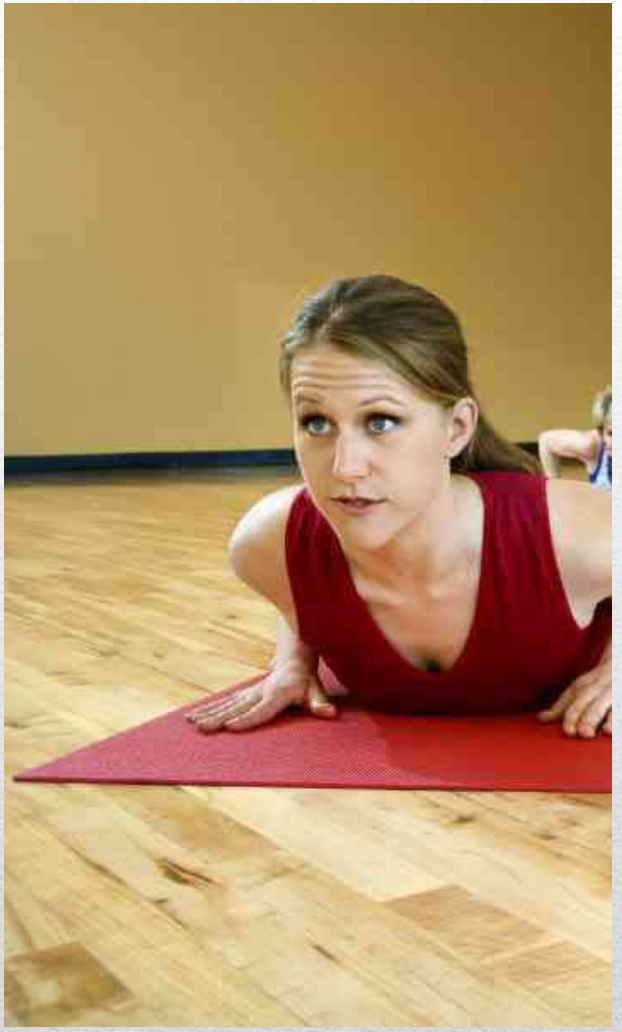

Avoid cycles of failure

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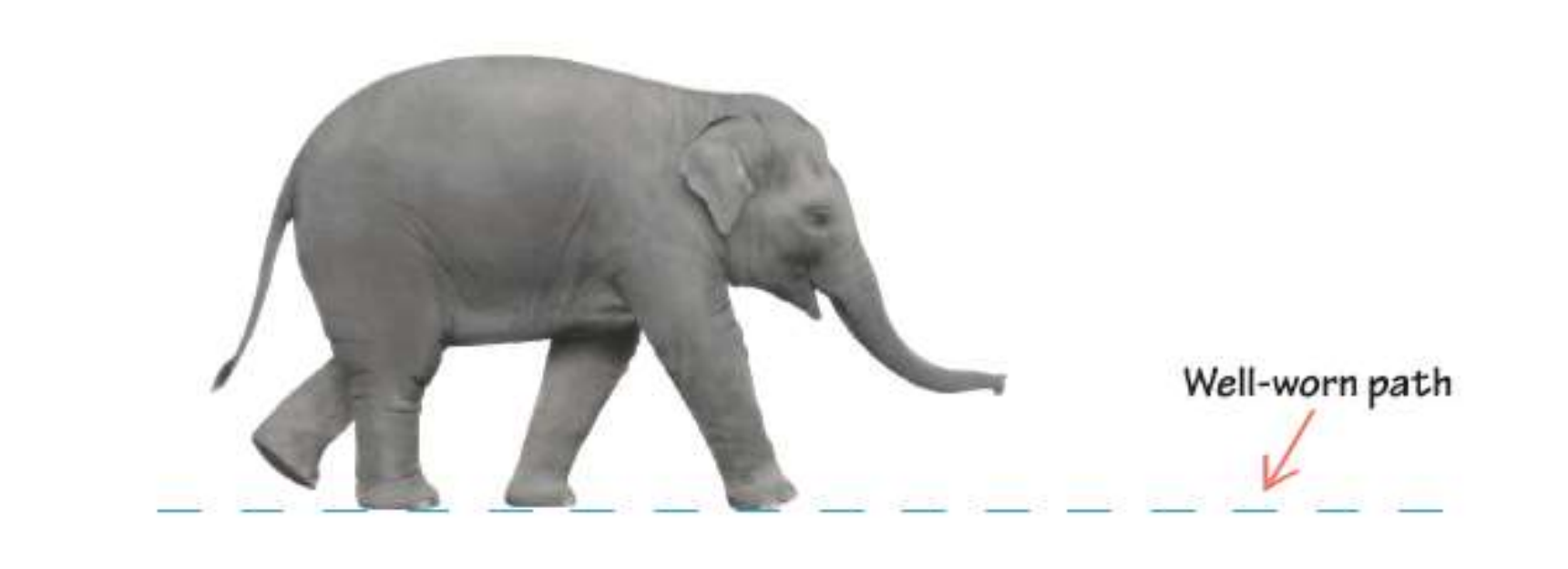

Create opportunities to practice

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Self-confirmation bias

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Sunk cost investment

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- Can I put a sign in your yard?

Start small

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Feedback

- What does the feedback loop look like?
- How do they know they are doing well?

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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

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Now you try

Take your change, and address the six questions:

1)
2)
3)
4)
5)
6)

1. Make it real: Can they viscerally experience the need for change?
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REINFORCING AND MAINTAINING

Change is slooooooooooow

Fix the environment

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Environment Matters

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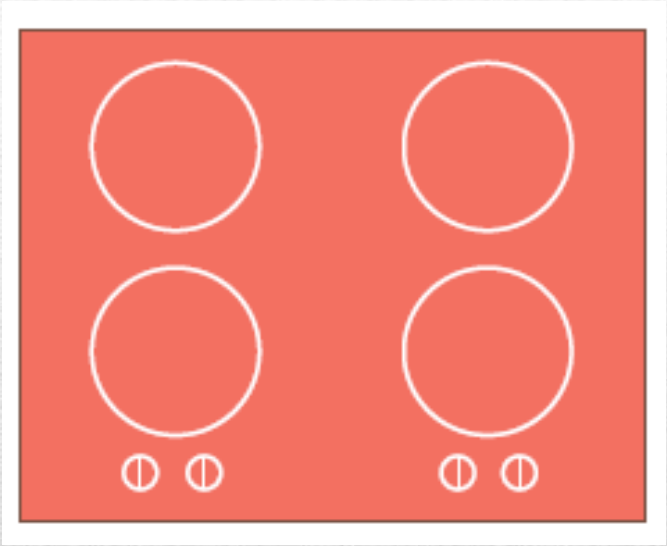

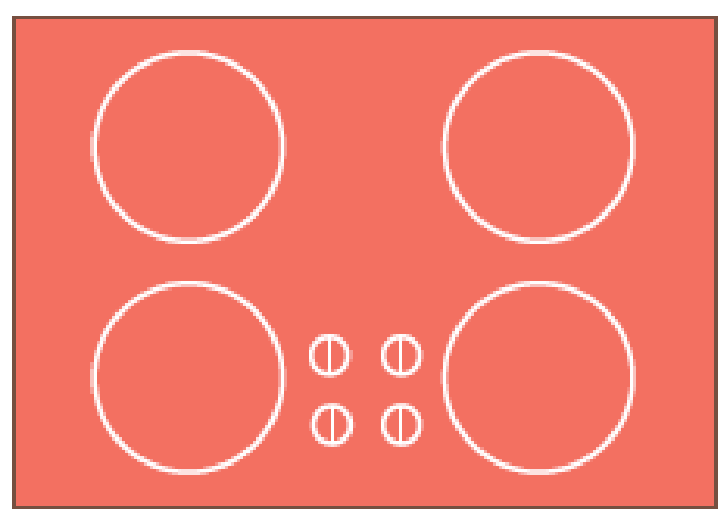

Make it easy for people to succeed

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Create an environment that supports them

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I need to get this on a coffee mug.

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…it's just hard

Sometimes it's not complicated…

Madrigal, A. "When the Nerds Go Marching In." *The Atlantic*, November 16, 2012. Available at http://m.theatlantic.com/technology/archive/2012/11/when-the-nerds-go-marching-in/265325/. Mentioned by Russell Davies: http://russelldavies.typepad.com/planning/2013/01/its-not-complicated-its-just-hard.html

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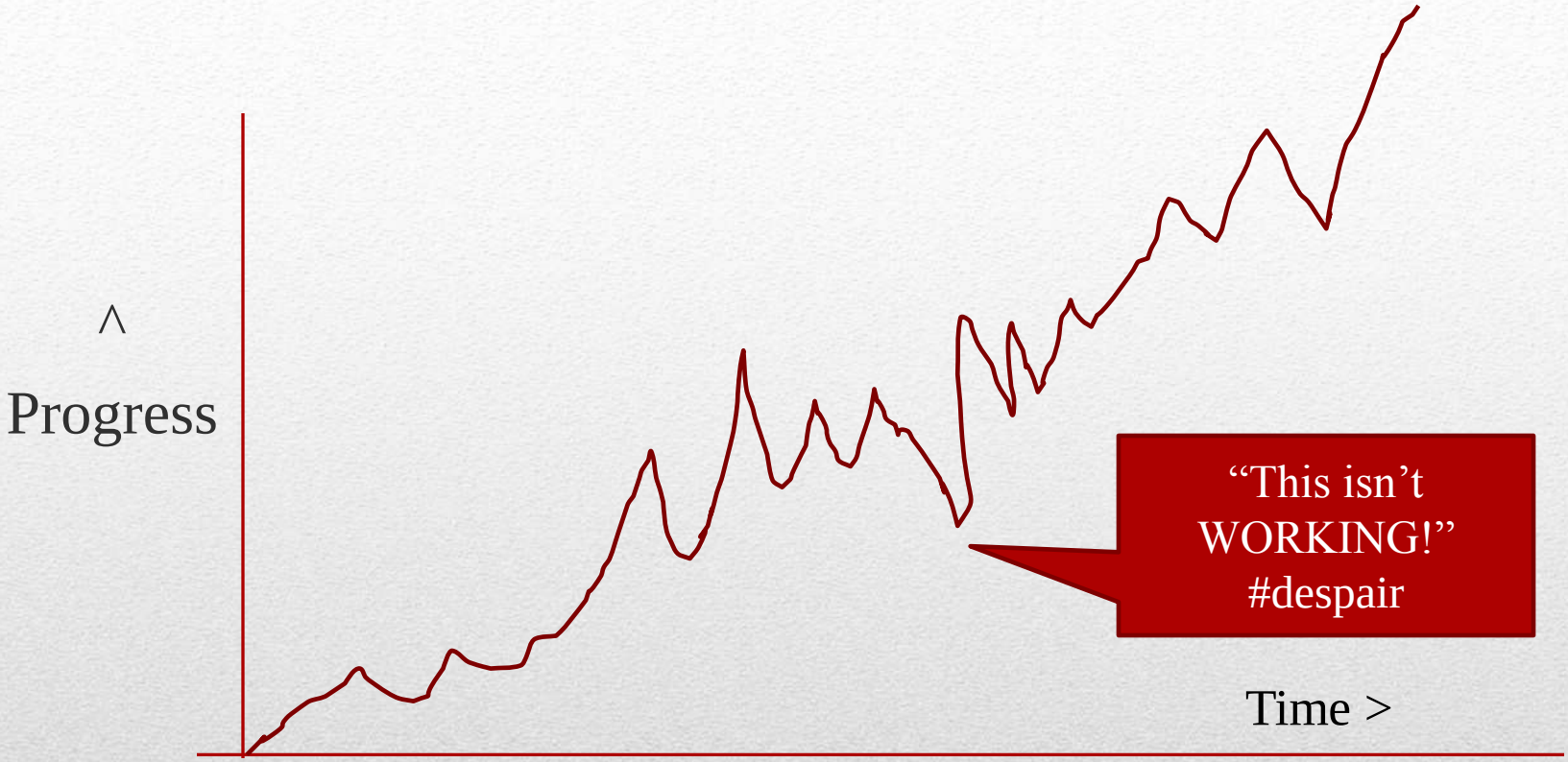

Successful change looks like this

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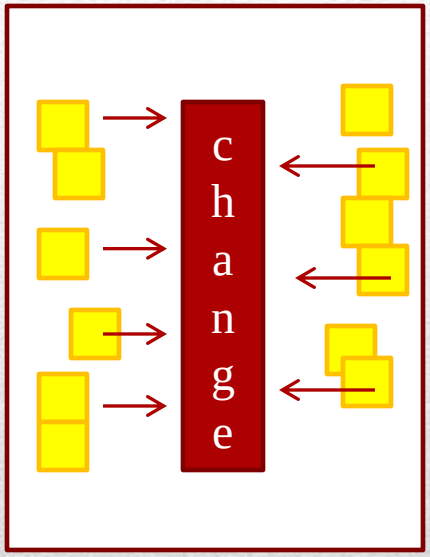
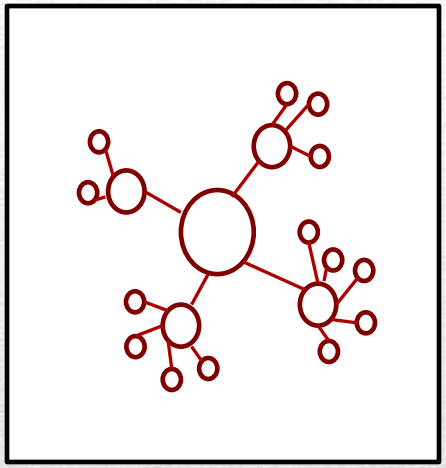
- Then do it again:

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?
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We still have time?

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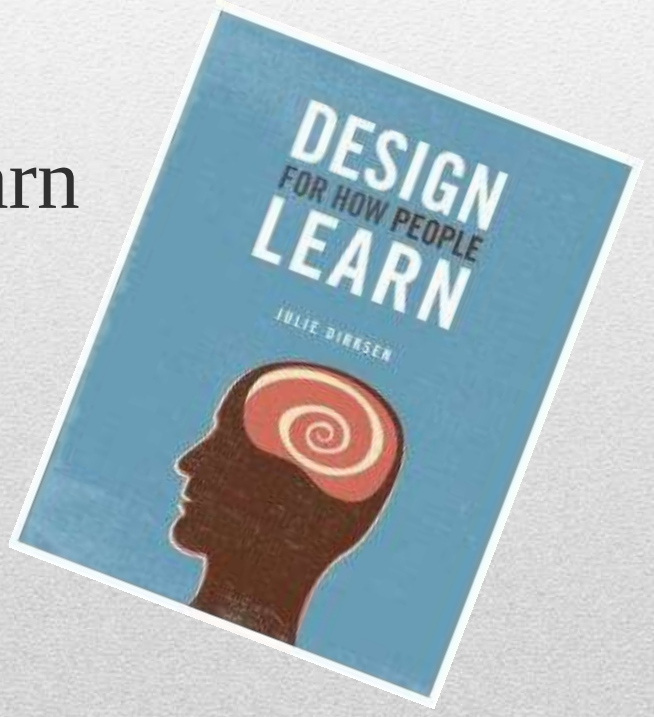
Design For How People Learn



Questions?

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[NEEDS UPDATING!]

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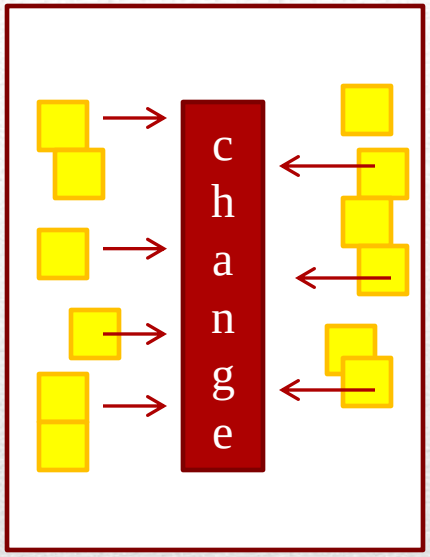
Force Field Analysis



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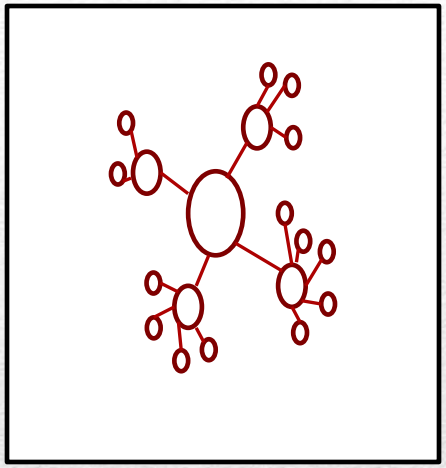

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Tools for Change

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