THECR NETWORK

Work Out Loud (WOL) Circles with John Stepper

SNAPSHOT

SPEAKERS
John Stepper and Catherine Shinners

COMPETENCIES
Cuture

MATURITY PHASES
CMM1, CMM2

SUMMARY

The Community Roundtable is a big fan of Working Out Loud (WOL) as a practice and many members participate in their weekly threads. WOL is a terrific stepping stone for encouraging engagement and behavior change in an organization. John Stepper has a particular approach to WOL using circles and came to share his approach along with practitioner Catherine Shinners.

The highlights of the discussion are noted below:

1. John cautioned that introducing the concept of WOL circles is like introducing diet and exercise; people know that it is good for them, but change is difficult. People know that they should build a network and that they should be visible, but they are not necessarily in the habit of operating that way. Therefore, this needs to be treated as a behavioral change program in that it helps people to develop new, positive habits.

    a. There are five elements to this program: relationships, generosity, visible work, purposeful discovery and a growth mindset.

    b. These elements tap into people's intrinsic motivators – autonomy, mastering and purpose. Therefore, there is a greater chance of success if these motivators are met.

2. At the core of this concept is relationships and building a network. It uses the conventional wisdom of relationships, plus the power and reach of modern technology. The way to build that is with generosity. Not naïve generosity, but tapping into the idea of reciprocity, something for which humans are innately wired. Therefore, John stressed that he cannot overstate the need to frame this work as a contribution that could be helpful to other people. That is the magic key.

3. The purpose of creating WOL circles is to create habits. Each circle has a goal that they are working towards. By setting that goal, understanding what it is that they are trying to accomplish, who can help accomplish the goal and how the individual can contribute to others, the members of the circle have been forming a habit to think of their goal(s) in terms of people and contributions.

    a. The circles are groups of 4-5 people who have set a purposeful short-term goal. The circles meet for 12 weeks for an hour a week to help build the network for that goal.

Overview

- **Background – John Stepper:** John has written a book called: *"Working Out Loud"*. John introduced the concept of WOL circles at Deutsche Bank. The WOL concept was largely born of the experience of trying to engage zero to 80,000 people to use Jive actively. This experience has helped John to help others spread a set of behaviors that are positive for both the individual and the firm, particularly as it pertains to change management.

Case Study - Cisco

- **Background:** Catherine is a Consultant with Merced Group. She approached John for help to leverage WOL best practices with one of her clients, Cisco. Catherine explained how she used WOL circles:
  - First of all, Catherine did qualify that this was an easier case study because it was used in the framework of an overall digital change management effort. One of the elements of the change program was to roll out an Enterprise Social Network to a workforce of over 100,000 people. This process can be equated to bringing a battleship out to sea and trying to turn it around, so it needed a strategy that could transform behavior.
  - Transformation begins with the individual. There are many large-scale platforms that have to be developed with the infrastructure of the company, but the human element is lost. That is where John's WOL program fits beautifully.
  - The change process begins organically. Anyone in the organization can pick up the concept, advocate for it and bring it to light in a variety of ways. John has a website (see Resources Section below) and there is a Facebook group for conversation and help.
- **Process:** Catherine shared how she introduced the concept of WOL circles:
  - *Insight:* Catherine explained that she wanted broader inspiration within the client environment at Cisco, so she asked John to give an hour-long broadcast video. Attendance was high and the video could be viewed at any time afterwards as people shared and inspired their colleagues.
  - *Inspiration:* The video was used to create a tone of inspiration so that it could have an impact. People were very intrigued. Therefore, they coupled that intrigue with broader awareness. In doing so, Catherine managed a cross-company collaboration community of several thousand members who created lots of resources in their community, hosted talks across the company about it, used other communications mechanisms and also conveyed global case studies/stories shared by John. One of the great things about sharing the case studies/stories was that it not only created a true understanding and visceral experience about what it means to work in this way, set goals and to have that sense of control and advocacy over their own work and purpose, but that they are part of something bigger; that other people are doing this, as well. That is a very inspirational experience.
  - *Awareness:* In order to take this from initial inspiration and awareness, Catherine helped them to create WOL circles. Yes, this is very much a self-starter type of program, but Catherine did help move the process along by offering to facilitate the circles. By

simply taking the step to join a circle automatically expands the individual's network to four people that they have never met before in the company.

- To help this process along, Catherine ran a half-hour orientation session in Jive with a page dedicated to housing WOL circle background, links and an overview of how people can use the circle guide week-by-week as a way for them to move through the process.

- Catherine also communicates with the circles through a weekly newsletter. She uses this opportunity to reach out and ask how it is going with the circle.

- **Convening:** As of mid-January of 2016, there are approximately 14/15 circles of 70 people across the company. It really fits very well with the overall vision and mission of some of the digital transformation, which is to provide the enterprise social network with a way for people to effectively collaborate and create a sense of network rather than just organizational hierarchy. Furthermore, these individuals have the power to manage that network, which is very empowering.

- **Enlarge:** Catherine explained that the next step is an exploration and a prototype. The goal is to enlarge this and create partnerships across the organization. Through these partnerships, they hope to create an understanding that people can use these circles to augment their resources.

- **Outcome:** Catherine shared that they have enjoyed some terrific excitement and feedback from those that have participated. The process feels very relevant. The Company wanted a process that would help them step into this change management effort with greater ease, especially since email and more traditional ways of interaction were their communication norms.

  - Catherine has also had people tell her that these circles have had an impact on their lives. Again, these goals can be professional or personal. People often took the time to thank her.

    - John added that he has also had more than one person tell him that this process has changed their lives. It has the power to change lives because it gives people a very simple method – along with some support – to say a goal out loud and take steps towards achieving it. It taps into a sense of sense of control. Most people work inside what feels like a big machine. When they are given even a little taste of control over their access to knowledge and opportunities, it is remarkably empowering.

Best Practices

The following is a summary of best practices as shared by participants within the discussion:

- **Understand the Five Elements of the WOL Circles:** People know that they should build a network and that they should be visible, but they are not necessarily in the habit of operating that way. Therefore, this needs to be treated as a behavioral change program in that it helps people to develop new, positive habits. There are five elements to this program: relationships, generosity, visible work, purposeful discovery and a growth mindset.
  - John explained that the reason that the concept is framed in the above five elements is to tap into people's intrinsic motivation; employing the concept will make them feel good. These elements tap into the big three motivators: autonomy, mastering and purpose.
  - At the core of this concept is relationships and building a network. It uses the conventional wisdom of relationships, plus the power and reach of modern technology. The way to build that is with generosity. Not naïve generosity, but tapping into the idea of reciprocity, something for which humans are innately wired. Therefore, John stressed that he cannot overstate the need to frame this work as a contribution that could be helpful to other people. That is the magic key.
    - The reason that reciprocity is important is that it takes away from the practice of an individual broadcasting their skills and talents, which can come across as self-promoting or manipulative. Instead, the individual is merely trying to be helpful. There is not a scorecard, only reciprocity spread across a network so that, in turn, eventually there will be a mutual benefit.
    - With the idea of being helpful and reciprocity, the act of helping will be much more authentic. Therefore, people will feel good about the process.
  - The last two elements encompass the approach of WOL. Purposeful discovery means there is a goal in mind. There needs to be a point to this process or people will not do it. Therefore, when John helps people implement this process, he tries to ensure that people feel that purpose and continue to experience it until it becomes a habit.
    - The way to spread this practice is to tap into the fundamental elements of building a habit, which are small steps practiced over time with feedback and peer support.
- **Introduce WOL Circles:** John stated that all the talks he did on this process never really amounted to a great deal of success. However the circles help to form a habit. The circles meet for 12 weeks for about an hour a week to help build the network for that goal.
  - During the 12-week period, the members of the circle will practice the following questions:

- What am I trying to accomplish?

- Who can help me?

- How can I contribute to people to deepen the relationship?

  - ➢ As people experience this process over the 12 weeks, it sparks the intrinsic motivators. It gives individuals control and access to learning and to opportunities. It helps individuals to feel like they are getting better at something and that it is purposeful.

  - ➢ Deutsche Bank now has 150 circles and they have been working on spreading these circles to other companies.

    - These are trusted, self-directed circles. Individuals do not have to get permission from their managers to participate, nor do they need to be nominated by their managers to participate.

    - John explained that they purposefully ensured that all the guides were available online so that people knew what to do over the 12 weeks. It was meant to be free and self-organizing so that people in this trusted circle could go after their goal.

    - No matter what that goal is, the point is practice. By the end of the 12th week, the circle members are in the habit of thinking of the goal in terms of people and contributions.

Lessons Learned

The following is a summary of lessons learned as shared by participants within the discussion:

- One participant asked if the members of the circle within Cisco are Working Out Loud only within a closed group or if they support each other directly while also sharing their posts with the greater community. Catherine replied that she has provided people with the opportunity to be in a circle. She then simply constructed the circles from people who made inquiries.

  - Catherine encouraged people to create circles outside of their direct peer group in order to broaden their network and understand varying perspectives. People were very receptive to that idea.

  - Catherine added that the number one goal for her was to help these circle members experience this practice and make it into a habit, while also hoping that something would click that this is not just about using social media. It is an approach to achieve a goal,

either personal or professional. Therefore, each time they set out to achieve a goal using these circles, they need to ask the three questions that John mentioned earlier.

- Back to the diet and exercise metaphor, since change management is such a difficult task, it really only works if it resonates emotionally with the individual and taps into their intrinsic motivators.

- In Catherine's experience, this process does need stewardship which, fortunately, is a skill inherent to community management.

- Hillary asked who are most likely to be early adopters to this process. Catherine shared that in her experience, it has been a wide range of people from new hires all the way to more senior people. There have been people in all functional orientations from sales to supply chain, as well as globally. Yes, some groups are more tentative and others are naturally more gregarious, but that could be true about anything. John agreed. It is not common to just the young. It is a process that is simple and universal.

- Another participant asked if people experience stumbling blocks with respect to what they should share and/or contribute. John replied that the circle guides are there as a resource. Each week has an exercise with step-by-step suggestions for how to complete the exercise. It lays out fear-free baby steps that gradually increase each week. For example, in the first few weeks people are asked to offer up universal gifts of recognition and appreciation, which is easy. Many people, to complete this exercise, will – for the very first time – tweet to John "Reading WOL". It is a very easy way to reach out to somebody and John replies to each tweet. The point is that sharing is frightening for people and ambiguous. Therefore, the guides help to take the fear out of this step and disambiguate the questions. The circle guides give circle members a taste of how it feels.

- The question of timeframe was raised. Catherine stated that the way she is structuring it right now is to gather the circles mid-point and give them the opportunity to share their experiences across the circles. She helps them to understand that in the circle, all is confidential and if the group agrees to share they can, but they are not obligated. She is trying to help them to understand that within this particular organization they are the first wave and they, therefore, have a great deal to contribute in terms of sharing their insight about the process.

- Hillary wondered if these circles could be implemented to hone in on a specific problem or if they should be kept open vs. fitting a specific goal. John replied that certainly the circles could be used in this way, but the book is squarely aimed at individuals. The reason John focused on the individual level is because the team goal – as an initial starting place – is not enough for people; it does not tap into their intrinsic motivators. For some people it will work, but John sees

it as almost a foundational skill. So, if Cisco spreads circles as a way to increase the digital literacy of people and they are doing it because they generally care and they want to keep doing it, the Company will be in a much better position when they need to solve another team goal. So, yes, it could be a place to start, but to increase the odds of success, start at the individual level. Plant the seed and spread this foundational practice so that people see the benefit, which will help them to have that needed mental shift.

- One participant shared that she tried something similar in her non-profit organization, but called them "study groups". However, she had a difficult time engaging people to self-organize and asked for advice. John replied that when he first implemented this he tied it to an event. There was a talk at the event and signup sheets afterwards asking people if they would be interested in joining a circle. Afterwards, they did one of two things. Either a lynchpin like Catherine would form groups of 4 or 5 to make them as diverse as possible or facilitators would offer to organize it. They would post on the community advertising when they would meet. That helps the circles to be formed. The rest of the work is done with the circle guides, meaning that the very first session uses simple guidelines for people explaining how to share their goals. There is lots of empathy and listening woven throughout the guide, helping people to care more because there is a shared vulnerability.

- There was a question about how many of these circles actually finish the 12 weeks. John did not have a definite answer. Like peer support groups, there is no magic. People organize the meetings and some of them are great and some never get out of the gate. John is working on an app right now to help increase that success. It will give the participants gentle nudges throughout the 12 weeks, collect data and help teach people how to run these circles.

- John explained that these circles do work best in person. Some people meet online, but it should never be solely online. This is an intensely personal process; face-to-face contact should be encouraged.

- One participant asked how to show people the value of the circles. John shared that certainly there is a self-selecting bias initially in terms of who will participate and who will not participate. However, social proof is powerful and that will help the word spread. Therefore, instead of a change management program that tries to get everybody at the same time, this acts as a free, distributed, self-organizing movement. Start with the early adopters (i.e. motivated). Then let it spread ripple-by-ripple.
    - Catherine added that there are many community management skills used in helping move this process along. As with community members, some members are more shy than others. For a successful program, it is not just about launching. It is self-directed

once people get started. The facilitator does not have to be present at every meeting, but is available if they get stuck. If they have something that they are really excited about, it is amazing how their experience spreads.

- Inevitably, the company will want to know the ROI on implementing these circles and allowing employees to participate on company time. Catherine explained that for Cisco, the circle process is tied to their digital change management effort. From that perspective, it is a small program that looks at how to help people work in new ways in order to maximize the company's investment in an enormous social collaboration. From that perspective, it is part of a change management rationale.

  - John added that it is easier if there is C-Suite support, but for the most part he tells people that he purposefully created it as a way to plant seeds within the company without needing management permission. Therefore, it is not only the top talent that has access to it; anyone can do it. If the person's boss does not want the employee using company time, use a lunch hour or meet after work. John created it as a career networking benefit, which could be argued to have a benefit to the organization overall.

Additional Insights

Hillary asked participants to share what they would like to learn from the call, as well as their experiences, if any, with WOL. Participants replied with the following:

- Most participants were on the call to learn how others are using it within their organizations.
- A few participants were interested in how to show the value and impact of these circles.
- A few participants were on the call to learn how to create engagement and interest in WOL circle participation.
- One participant stated that he is about to launch a WOL pilot.

- Lastly, one participant was curious to know how to best scale the idea of WOL circles throughout the organization.

Resources

- As mentioned in the discussion: http://workingoutloud.com/the-book/
- As mentioned in the discussion: http://workingoutloud.com
- As mentioned in the chat: https://vimeo.com/69478241