ROUNDTABLE REPORT

Creating a Culture That's Not Afraid to Fail

HIGHLIGHTS

Creating a culture that is not afraid to fail is truly a two-sided issue.

In order to be successful, in some cases it will require a culture change within the organization; no easy feat.

Secondly, as was a running theme throughout this call, continual training will be needed to help people overcome their fear of failure, whether it is with technology, social media or any new challenge.

As such, what was offered on this call was a slew of best practices and techniques, none of which will be right for every organization. Rather, it will involve trying many different things to find that success.

SPEAKERS

Beth Kanter and Rachel Happe

COMPETENCIES

Strategy, Culture

MATURITY PHASES

CMM1, CMM2, CMM3, CMM4

OVERVIEW

- Beth shared with the participants her insights regarding fear of failure and how it relates to a culture change:
- Beth explained that the concern for failure within an organization encompasses the much larger issue of culture change. It is a topic that she writes about frequently in her blog, particularly as it pertains to technology. Social media certainly falls into this category because it is so new to the corporate environment (an environment that is not always that forgiving of failure, making this new field even more challenging). Therefore, the first step is to define failure. Beth's definition is: "A social media strategy or a program implementation that wasn't 'Martha Stewart' perfect and didn't work as well as expected, especially the first few times it was tried." This is a common occurrence with social media, especially in the early stages. The reason it is so common is because unrealistic outcomes have been set due to naivety. Another reason is that a methodology for learning was not implemented. Or simply a very sloppy strategy implementation was used. The outcome is what we "think" are poor results. Consequently, many organizations are quick to claim that social media doesn't work and the program gets dropped. Unfortunately, in the North American culture there is not a lot of value placed on the learning process. However, the way it should be viewed is that the "failures" are really an opportunity to improve the strategy, especially the second, third or fourth time around. Beth wonders: "Why in the West is there this emphasis on perfection? Getting A's, 100%, etc?" All in all, to truly appreciate failure, a culture change is in order

OVERVIEW

- Beth shared an approach that she has learned through listening to Dr. Michael Quinn Patton. He invented the field of "developmental evaluation" and has termed it: "Mistakes to Learning." In this approach, the idea is to reflect on the mistakes and learn from them. The evaluation field has been plagued with many challenges because traditional evaluation techniques are deeply rooted in Western ways of thinking. As a result, he has researched the growth of the evaluation programs taking place in developing countries. He started to collect creation stories (like Genesis) to explain the difference between these traditional approaches (summative evaluations where you create a program, implement it and you collect data to measure its success or its impact) vs. developmental evaluation, which is an evaluation that gathers information to help you improve the program on an ongoing basis.
- To better understand this evaluation theory, Beth shared 2 Genesis stories (which have been paraphrased for this report). The first story is one that most people are familiar with, i.e. God created the earth and on the 7th day he rested. Implanting this story in the corporate world, there would be a lot of questions that would need to be answered. There would have to be copious analysis conducted – how do we know this is right? What are the expected outcomes? What measurements will be used? Questions that all in the corporate world can relate to. As a cheeky ending to the story, the 8th day is Hell (or ROI analysis). Now an opposite Genesis story hails from the Māori people of New Zealand. Their story is about Mother Earth embracing with Heaven and having children. However, in between this embrace the space is very dark. The children tried different ways to bring light to this dark space. They were finally able to push their parents apart to bring in the light, but noticed that it left the Mother Earth naked. They tried various ways to "dress up" Mother Earth by planting trees. Eventually, they found success. So, the outcome is the same, but the approach was different. This is what Dr. Patton calls the "Essence of Developmental Evaluation". Beth explained that using this approach with a social media strategy would mean thoughtful piloting, listening, learning and adapting.

BEST PRACTICES

- The following is a summary of various best practices that emerged from the discussion with members:
- A first step in trying to create a culture that is not afraid of failure is to define success in the early stages as that of learning. As long as the learning is helping to move the strategy forward, that should be a measure of success. If we are ever to move past a fear of failure, we have to accept mistakes as valuable forms of learning. The learning is an outcome, not something that is bad or a “waste of time.”
- One member explained that how she helps people overcome their fear of social media is by stressing to them that this is just another means of communicating electronically.
- If something doesn’t work, recognize that it’s an opportunity to learn, not lay blame. That has to become inherent in the culture in order to overcome that fear of failure.
- When explaining social media to newcomers, use metaphors that people understand; something for which they can make connections and analogies that fit their frame of reference.

BEST PRACTICES

- When helping people to overcome their fear of posting in communities, try conducting training forums that explain the various language nuances associated with posting. Recognize that if the community deals with customers directly, there will be even more of a fear.
- If trying to get someone used to social media, ask them to create a blog on a topic that is non-threatening and they have a lot of knowledge to share on that topic. Beth offered that one of the best ways to become less afraid is to create opportunities to test the waters in a low risk environment, especially for leaders in the corporation. Jim Storer recommends bi-weekly authoring sessions to help people make their first posts. Be there for them initially to catch any mistakes and coach them through the process.
- Those in a leadership role within the organization are oftentimes more fearful of social media than the general populace. One-on-one coaching is a best practice for these individuals. With these personal sessions, they can ask any question they need to in a non-threatening environment. Ensure them that their session is a private and confidential one, especially for those C-suite executives.

BEST PRACTICES

- When conducting group training, engage members of the group to help develop internal social media policies/philosophies for the organization. This will also help release some of those fears. List the concerns and follow up with specific examples on specific scenarios, i.e. if this happens, how would we react and is it covered in the policy?
- Rachel added that a great technique to help with this practice is war gaming. It's a terrific exercise at the executive level to help ensure that their worst case scenario issues are covered, all the while helping them to become more comfortable with the concept. Beth added that with non-profit family foundations, they have to be very careful about lobbying or they could lose their 5013 status. A war gaming scenario would be if a member of their staff identified themselves on Twitter as belonging to the foundation and then re-tweeted a message about signing a healthcare form petition; that's lobbying. Their answer to this worse case scenario was to use screen captures to initiate a discussion with the staff and then ensure that it is properly spelled out in their guidelines.

BEST PRACTICES

- Consider holding a monthly meeting within a forum and letting the community know that an executive will be available for an hour to answer questions. Ensure that the executive has the comfort of a coach in place to filter his/her responses before they are typed back to the community.
- In your coaching sessions with people, encourage them not to over commit. If you want to help someone, great. But if you do, you need to be committed to follow through. Perhaps a better alternative is to engage someone else who can help. It's very damaging for a corporate and/or personal reputation to not follow through. Added one participant, a guiding principle is to share what you know and don't guess about what you don't know. Help people realize that it's okay to say that you don't know something and then offer to find someone who can help.

BEST PRACTICES

- know something and then offer to find someone who can help.
- Beth explained her scaffolding approach to social media. First of all, the newcomer begins by learning how to use an RSS reader and then picks out 3 or 4 bloggers that write about professional topics that interest him/her. The next scaffold level has the newcomer picking a conversation for which he/she feels comfortable leaving a comment. Sit with the trainee through the commenting piece. The next scaffold level involves helping the newcomer to write a blog, but to do so behind the firewall. Once they are used to that, they can guest host on someone else's blog (Beth has had a lot of guest host writers lately on her blog). From this last step, the blogger can get feedback and reflect on the experience to see how it can be incorporated into his/her workflow as an organizational blog. *(See resources section for Beth's "how to" wikis).*

BEST PRACTICES

- Rachel asked Beth to share if there are best practices for helping people to learn given that there are so many different learning styles. Beth replied that, in her experience, one of the best ways to determine someone's learning style is to observe them on their computer. By watching how they navigate, you can gain a sense of whether or not they are a visual learner, a text learner or a clicker. Once she determines their style, she will match her instructional style to them. If she notices that they are a person that reads the menus, (which are very linear), then she gives them linear instructions. If they are visual, she'll have them look at the screen and pick up on visual skills. If they are constantly clicking, she'll let them explore and then have them tell her what they discovered.

BEST PRACTICES

- Beth recommends that in order to begin changing the culture to accept the learning associated with social media adoption within the organization, it needs to be a part of the leadership. As explained, there has to be some reward and recognition of the benefits of the learning. To encourage the use of social media, it should be within the person's job description and part of his/her performance review. When strategy is happening at the organizational level, there is a lot of individual learning, but that needs to also come together as a group. What are the group conversations about and how does that get translated into policy and strategy? Furthermore, there needs to be some monitoring. If you are going to talk the talk, you have to walk the walk. It doesn't work if the organization advocates being a learning organization, but then penalizes when things don't go as planned.
- One member shared that they have had success within the internal employee community of their European office. They started off small, but with leaders hosting. By getting the leaders involved, it helped people overcome that fear of failure. If their director/VP level management is willing to post, it can't be all bad. Accordingly, this has been one of the company's most active communities to date.

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LESSONS LEARNED

Participants were given the opportunity to partake in the participatory budgeting game. The scenario was a community manager working for a mid-sized company of about 1000 employees. The community enjoyed about 450,000 members with a budget of $27,000. The community manager is tasked with a list of improvements, but that list is expensive at $42,000. The object is to prioritize what should be funded.

Each call participant joined the Weave platform and was given an equal portion of the budget. Weave automatically grouped people based on pre-determined rules set up by Luke, i.e. first come first serve forum slotting. As soon as this forum is filled up, another forum will automatically be generated by the platform to manage the process. In this exercise, each forum was limited to 6 people based on the call numbers. That is an important feature of Weave. Human communication can scale without boundaries. That's a broadcast model.

Learn more about the Weave Platform

LESSONS LEARNED

When collaborating, the platform preserves human collaboration structures by limiting collaboration to 8 people in a forum. It's not formally limited, but strongly recommended that that size is maintained.

The Weave platform gave a list of budget items. For this exercise, the budget line items were:

- Information Architecture
- Offline Events
- Gamification
- New Member Resources
- Updated UX
- Updated Event Communications
- Content Tagging and Taxonomy
- Update Member Profiles
- "How-to" Feature Guides.

Participants explained why they felt a certain line item was important not just to them, but to the stakeholders and constituents. This is the foundation of participatory budgeting. Look for the patterns in order to make the best choices for collaboration. A budget line item has to be fully funded in order to be considered important enough to be funded in reality. The exercise is given a pre-determined time limit.

- The Weave platform will let you associate a pool of facilitators with a pool of participants. It will automatically stitch up facilitators and participants on your behalf.
- A whisper function is also available on the facilitator's screen. Whispers are part of the research record. They are used in the post-processing and the analytics.

Results. Across both forums, the items that were fully funded in this exercise were New Member Resources and Updated UX. As a community manager, these would be the items to action. This exercise has yielded powerful insights. It is not that any of the other items are bad ideas. Simply, compared to other items in a collaborative forum that allows people to discuss the line items, they just weren't as important.

LESSONS LEARNED

When people are playing a collaborative game – such as what the Weave platform offers – people are more authentic to their true selves.

Luke believes that with surveys, people are not always authentic to their true self. But when you're playing a game about prioritization of resources, you become deeply embedded and want to participate in a way that you just wouldn't get on a survey. Hillary asked if the entire group had access to the whispers or if it was only the administrators. Luke replied that their terminology is "producer."

The producer is the only person – or those that the producer gives access to – who see the whispers. If you are working in a very sensitive environment, the Weave platform has a tremendously large number of fine-grain security controls, including the ability to provide anonymous participation. If you configure the forum to be anonymous, it really is anonymous.

Luke recommends running a minimum of 5 forums to clearly identify actionable patterns.

That's based on research by Abby Griffith out of the University of Illinois. We know that quantitative research is statistically significant. So, she asked a different question. Rather than arguing for statistical significance, she questioned the validity of 75-80% accuracy, i.e. the number of people you would need to talk to in a qualitative way to get "roughly correct" as opposed to "statistically correct." She found that that number to be 31 people. If you can get 31 people talking, you can get roughly 75% accuracy. For many of the decisions made for software development, especially with Agile software development, 75% accuracy is sufficient.

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LESSONS LEARNED

This exercise is used on real companies.

Luke gave a few examples:

- Daimler Financial Services brought together their top 140 leaders from countries around the world to reprioritize a $181 million Euro IT budget using this technique.
- British Petroleum used the Weave platform to prioritize a $2 billion CapEx pipeline for their North American pipeline business.
- In Europe, PayU is a payment processor similar to PayPal. They used this technique to prioritize their $55 million project portfolio.
- San Jose used this technique in 2011 to help them dig out of their $100 million dollar debt. They engaged citizens to make these tough choices. This involved prioritizing the services of Park Rangers over Police over the fire engine over code enforcement and long-range planning. These are tough choices. By using this data and engaging community leaders in San Jose, they were able to get insights that helped shape the budget.
- These techniques have been tested with the Karlsruhe Institute of Technology in Germany. The research demonstrated that people were more engaged. They felt that they had a better voice and the process was enjoyable.

LESSONS LEARNED

- The following is a summary of lessons learned as shared by Beth and those participants within the discussion:
- Rachel asked the group to share what they are noticing on a daily basis with respect to the fears experienced in the social media field. She also asked them to add how they felt that community managers could help people overcome these fears and maybe even be rewarded for experimentation:
  - As shared by one member, what she notices is that people are afraid to say the wrong thing. What she has done to help people overcome that fear is to assure them that this is new for everyone. Since it is a new experience for everyone, the best thing to do is ask questions. Reassure them that there are no stupid questions. As shared in another conference call, this participant's organization hosts lunch and learns and social media socials in order to share success stories, tips, tricks, what's working and what's not working so that everyone can learn. She stresses that although this may feel new, it is just an electronic means of communication. That being said, Rachel added that there are things that exist in electronic communication that don't exist in personal communication, such as being able to read a bad form of communication over and over (thus making it more difficult to move past it). As well, Beth reminded participants that in electronic communication, there is no body language to soften what is said in print. Therefore, these points need to be reiterated with new learners to social media.

LESSONS LEARNED

- For another member, she felt that the success of community often depended on the executives in charge and how he/she personally valued the concept of community within the organization. For this member, early on in the one company she worked with it was certainly easier because many within the company inherently understood the value of community. However, towards the latter stages of her employment with that company, it became much more difficult because the company started to change. There became more of a focus on profits, costs and proving the value of community.
- An individual's profession may also dictate how they approach the use of social media within their daily tasks. The broadcasting business, for example, will have those individuals who are used to unscripted communication and those who are used to scripted communication. Those accustomed to unscripted communication will take to this with greater ease than those who do not. One way to help these people is to get them blogging on a topic that holds personal interest for them and is totally non-threatening (such as gardening, for example). People will approach this in different ways, but in each case, it's a matter of helping them make the connection that this is just another form of communicating.

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LESSONS LEARNED

- Rachel suggested that a big part of the fear of learning in this field is the public nature of social media. Agreeing with this comment, one member offered that it's almost like a form of stage fright. To help his company overcome this, he adopted a recommendation by Jim Storer to hold bi-weekly author sessions with the blog authors of their partner community. Initially, they begin with technology training. Next, they help them become comfortable with posting by being there when they do and coaching them to ensure that it is done correctly. It calms their fear if they know someone can help catch any mistakes until they get used to how it is done. For this member, they just started doing this, but so far it has been successful in driving more engagement from their authors. The next hurdle is getting more engagement from the community audience.
- As experienced by one member, the fear tends to not come from the general population as much as it comes from the leadership. For her, she has learned that the best way to deal with that is by offering rules of engagement, leading by doing and offering a lot of one-on-one coaching.
- In the experience of one member, when conducting executive coaching sessions one of their first questions tends to be: "Can't I have someone do this for me, spot check it and make it look like I'm participating without investing the time and energy?" Of course, the answer is no, no, no. For the executive level, time constraints is also a very real fear, as well as the legal issues. Her answer to these executives is to get started posting in a forum that they are comfortable with and have an interest in the subject matter. Explore it, explore who is talking about it and where (Facebook, Twitter, etc.) and then begin participating in the conversations. Don't force it right out of the gate. It has to be in an area that he/she is comfortable.

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LESSONS LEARNED

- Also along the lines of executive coaching, another participant added that she's had the problem of executives being overly enthusiastic in their postings. For example, she had a Senior VP who, from early on in the company, started regularly posting in forums, was comfortable with it and pretty good at it, too. As he started to climb up the ladder in the company, she cautioned him more and more about being too accessible because he was creating all these direct relationships with customers. What ended up happening is that the customers would go directly to him and by-pass all the regular channels. A lesson learned in this instance was to create a monthly session within a forum and let the community know that the executive would be available for an hour to answer questions. Then, before he typed anything, he would be coached on a proper response. So, this can go both ways. You can have executives that have a real fear about getting out there with employees and customers and/or there are those that don't have the proper filters in place and say/do too much.
- Beth added the philanthropy industry to the mix of the discussion, i.e. those corporations who give the money away. They don't want more people contacting them, especially people who aren't reading the guidelines about how the money is given away. As such, they don't see the need for engaging in social media. Beth's response has been to focus on the strategy. They don't sell anything per se, but there is a great deal of thought leadership. With all their resources that aren't necessarily proprietary, what a great way to share the information and gain value from the field of social media. Perhaps if more people knew about the organization, they could self-select better.

LESSONS LEARNED

- One participant shared that in his opinion, too many bloggers can be a problem. In his organization, they are casting a wide net on the number of people that they are trying to engage in blogging, but at the risk of deluding the personal brands of some of the other bloggers.
- Beth shared that she has noticed that in the academic field, it is more difficult to get them to shift gears and participate in the social media space. Perhaps it is because there are so many experts. They are used to narrow casting their topics and having a very structured approach to their learning. As well, it may be a function of their workload, their personal work habits over the last couple of decades, their learning styles and/or their personality.
- As explained by one member, their goal for the community was to try and open up the lines of communication, both internally and externally. From an external perspective, they wanted to make the company more accessible and more human. In terms of culture, the goal was more bi-directional communication with less executive push. The idea was to give employees more of a voice and more of an opportunity to understand what is going on in their company. However, it takes a long, long time to really feel like any progress has been made. Although it has been slow, there have been some positive results. Even in what could be perceived as negative situations (such as feedback that is more candid than what the executives would like), it shows that if the employees are willing to interact, they still care. They are giving you the opportunity to explain and hopefully, in their minds, right some wrongs. That can be a positive outcome to stem from communities if handled properly, which is a cultural shift in and of itself.

LESSONS LEARNED

- Along the lines of the above, this member also explained that oftentimes, she feels like an ombudswoman between executives and employees. What has been eye-opening for her is the executives who actually call to have negative feedback deleted are not the ones that she would have expected. They are typically the ones that on the surface have been all about collaboration. What that really means is they are only interested in positive collaboration, which is unrealistic. Beth added that Wendy Harman, Social Media Director for the American Red Cross has stated that the “opposite of hate is indifference”. She’d rather have people airing their complaints so that something can be done about it. What Wendy has done is show screen shots that capture the initial complaint and then describes how they turned it around.
- As a final lesson learned, Beth explained that as the person responsible for social media, your biggest ally is lots and lots of patience. It’s like a garden; it needs regular tending and weeding and over time, the garden blossoms and will grow, even though in the middle of it, the garden feels like a big failure. Her best advice is to keep at it a little bit at a time.

RESOURCES

As mentioned in the discussion – Author Michael Quinn Patton:

http://www.evaluationwiki.org/index.php/Michael_Quinn_Patton

http://books.google.ca/books?as_auth=Michael+Quinn+Patton&source=an&ei=OXOuSvmLJs3FlAfl6qi6Bg&sa=X&oi=book_group&ct=title&cad=author-navigational&resnum=4

As mentioned in the discussion – Rachel discovered a method to control her email inbox through several game-like steps as posted by Tim Walker - Inbox-fu (how to reduce your email inbox): http://www.hooversbiz.com/2009/03/09/inbox-fu-the-mystery-of-resadoth/

As mentioned in the chat dialogue – The CR Shawn Morton podcast. Yammer helped introduce the concept of micro blogging to a lot of people internally at Nationwide as a good, first step:
http://community-roundtable.com/2009/09/thecr-quick-chat-with-shawn-morton/

As mentioned in the discussion and chat dialogue: strategies to create a learning environment:

http://beth.typepad.com/beths_blog/2009/09/how-do-you-encourage-an-organizational-culture-that-is-more-receptive-to-social-media.html

http://bethkanter.wikispaces.com/wiki

http://howtoblog.wikispaces.com/

http://socialmedia-listening.wikispaces.com/