Continuous Change Community

Managing Data Effectively for Behaviour Change

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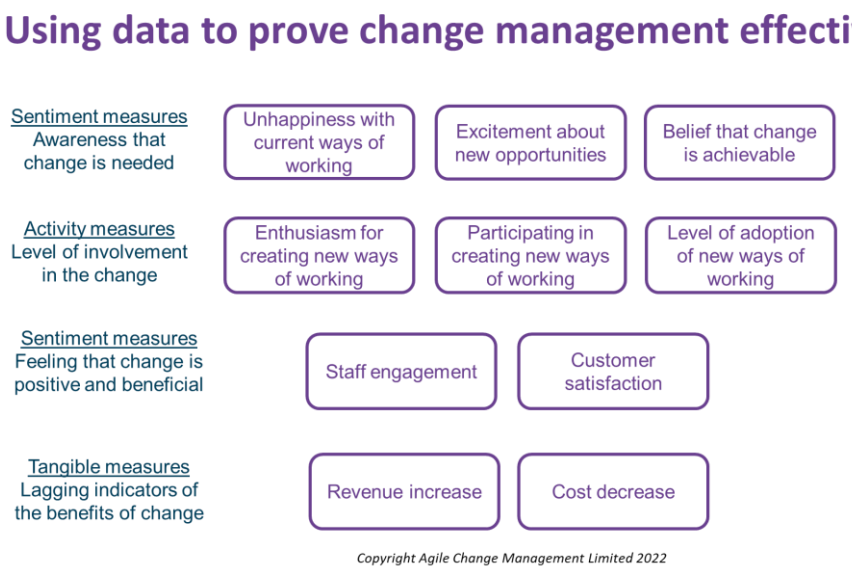
Melanie kicked off the session with her concerns that change management is falling behind other management disciplines in servicing the move that organisations are making towards a data driven culture. She asked if we are using data to provide evidence of the value we create for our sponsors, and if we are tracking enough data to let us know if we are on course for success?

She provided an example of 4 tiers of data, that emerge as we move through the change lifecycle, starting with awareness of the change, then tracking participation in the change, and whether people think the change is delivering value for them, and ending with the traditional tangible measures of revenue increases and cost decreases:



Melanie went on to suggest that as a profession we are missing several steps:

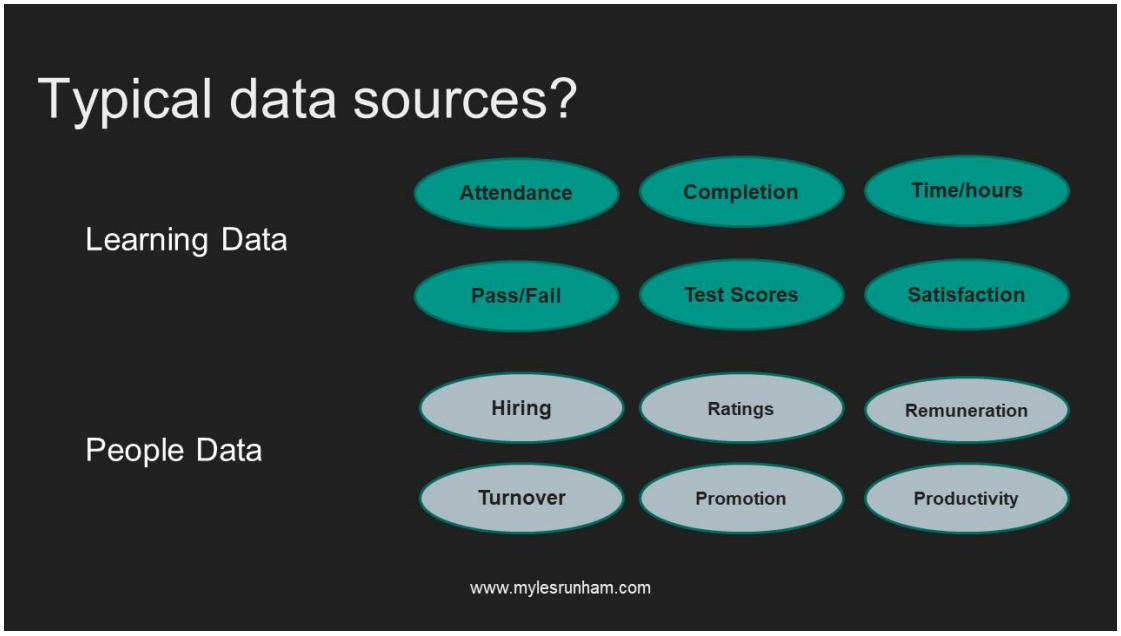
1. We are still relying on “lagging indicators” of cost down/revenue up which in the case of cultural transformations may become evident several years after the work has completed and the people responsible have moved on
2. We are not identifying the types of measures we can use to demonstrate progress towards successful embedding of the change

3. We are not identifying how we might measure this data, and account for this extra work in our initial strategy at the start of our change initiatives

Knowing that change involves people impacted by change learning and adopting new ways of working, we asked Myles to share his perspective, as he has a lot of experience in the collection of data in the learning and development arena.

Myles gave us an introduction to his experience with data taking us back to his early days in the BBC collecting and managing data. He went on to give us a potted history of data in a digital world. We must consider not just collecting data but how we use data for decision making. Teams often build reporting tools to help us understand the data they have collected without focussing on the question what decisions leaders need to make and how will this data help their organisation.

Myles shared a slide on data sources and explained his experience with learning data. Organisations spend time collecting data on people's attendance on courses, whether they have passed or failed the exams etc. The same is true for people data we think about what data we have, collect it and report on it. Whilst this data informs organisations of what happened in the past it does not inform them whether a behaviour change has taken place, which many change programs are seeking to affect.



The future will be greater use of artificial intelligence that can sweep information and extract data about what people are doing and helping organisations really understand whether behaviour change is happening. At the least glean insights about how people are using the new systems and processes. Of course, one data source about the use of a new system will not be enough to understand if projects are really changing behaviours. A wider set of data points would give us a better picture of what is happening.

Myles shared with us some of the activities new "digitally native" companies are undertaking and the results that this is giving. He also shared his perspective that the world has now tilted on its axis and instead of justifying why something should be a digital transformation, we should only need to justify a change if it is NOT a digital transformation.

These examples included content filtering to make recommendations on what people want to access and segmenting the groups to give insights on what these people want in the future, all the way to data for adaptive experiences and prediction.

We then moved on to thinking about data in three categories:

- Data for insight,
- Creating connections
- Achieving great user experiences

We looked at the traditional sources of data in a learning environment, with Myles making the point that this data is extremely basic, with two key pieces of data dominating:

- Did the person show up – attendance data
- Did they have a good experience – happy sheets at the end of courses

Myles explained that this data is very often "single source" i.e. it is just coming out of a learning management system or course evaluation process. There is no synthesis of data from multiple sources to create a richer picture.

A more sophisticated approach is to use experience data to help predict what to offer people next. If during a change initiative we want people to keep participating until the change has become embedded, we can offer them some initial formal training, but then we could have a menu of practice activities, and based on how the person behaves, what they work through quickly, what they struggle with in the initial training, we can offer more tailored follow up activities that could increase the "stickiness" that we know is so essential in change.

We looked at potential new sources of data that would give us greater insights considering things like how they are using the training products, what searches they are conducting in the materials, what value they perceive they are getting and so on.

At that point we opened the discussion to the group asking them about what data we should be tracking and what the organisations out there are finding as informative for their change programs. The insights we gleaned from the wider group were insightful. The group consensus was that when data is needed quickly, we start with what data have we already collected and what insights can that give us. This is taking us down a well-trodden path and we may find that this does not give the insights we need.

The group suggested that we take time in those early stages of data collection and really involve people to identify the best data sources. Whilst there was agreement that the data collection needs to be easy, we must also focus on quality and completeness of that data.

We need to really understand the value of the data and the insights that it is giving us, one member of the group suggested we need to be falling in love with our data and the information in provides. For example, does the data act as a signal or do we want to use it as a proof point? If it is a signal, we need to work out what it might be signalling, or we need to work out what might happen (multiple scenarios of happy/unhappy circumstances) so we can work out the possible indicators/signals and then look for them throughout the life of our changes.

Another important point was the subjective nature of the data. A lot of what we do is based on whether we are a trusted and whether those impacted by change want to follow us through the journey of abandoning current ways of working and taking the risk to adopt new ways of working.

What data accurately tracks this level of trust? If we collect simple sentiment data then people telling us that they are happy with the process so far might not be an indicator of progress, it might just show that we are currently changing things that they don't care about. This sentiment will turn negative when they are more directly impacted by the change.

Others were quick to point out that the constraints of GDPR were a concern for organisations that was stopping them from really getting the information they considered personal, that would give some of the insights that would drive change in behaviour.

The other key point that the group raised was the need to make sure you have data owners. Lack of ownership for data was a key reason why quality data wasn't being collected by their organisations. This relates to the value point raised earlier as organisations often fail to see the value of the data, they collect they also fail to drive for people to own and be accountable for collecting data. Soon the organisations find they fall into the trap of the conspiracy of convenience. The data they collect they fall back into collecting the easy and readily available data. This leaves organisations, for example, knowing how many people attended work, an event, or a training course without answering why did they attend or why did they choose not to attend and more importantly what difference has attending made to their performance in work. Building strong relationships with data owners, beyond our own function or department, is essential. There is rich value in business and commercial data, cultivating effective relationships with the managers of that data is highly important.

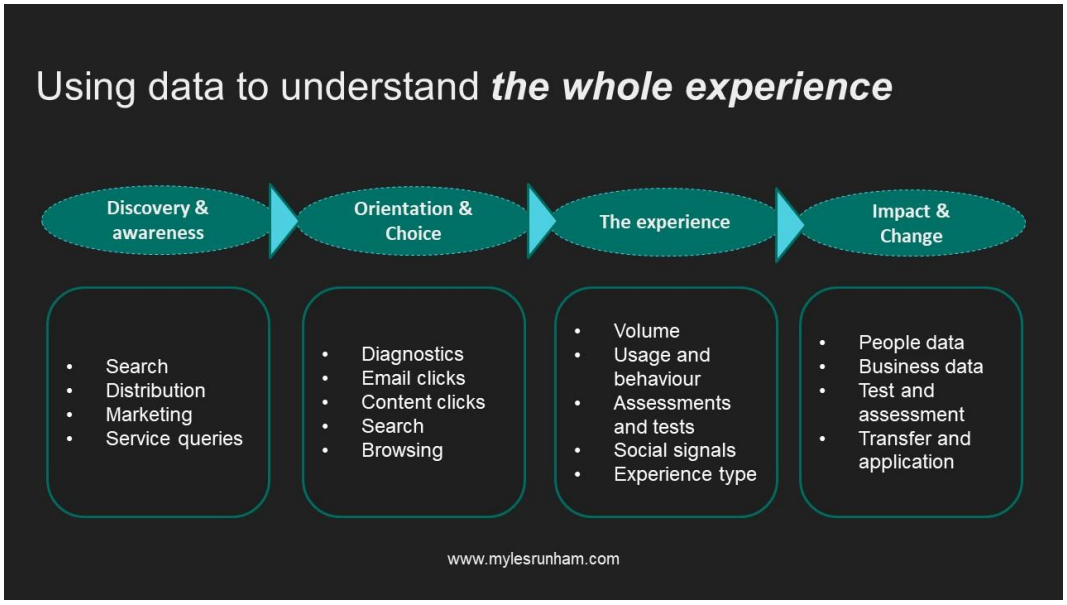
The opportunity for great insights being missed by the desire to keep data collection simple and convenient. Leading the groups to conclude the key steps are produce the data, own the data, and do something with it that is of value to the organisation. Notwithstanding the need to have standards, ensure the data is complete, accurate and timely.

The group moved on, to suggest that data driven organisations are the ones making the best decisions and those who fail to make good, databased decisions are probably the ones who won't be around in the future. We all should be focusing on making great decisions and demanding the data that will support them. Not being willing to accept the status quo.

One of the groups raised a potential benefit of using more data in decision making which is that it takes the pressure off senior leaders to try to navigate through the ambiguity. Instead, they can point to the evidence for the rationale for their decision. This also raised the issue that we need to connect with senior leaders to identify all the decisions they need to take, to identify all the data points that would enable them to take these decisions. There was a view that we are not doing enough of this analysis, circling back to the fact we are not strategically defining the data we need at the start of the change lifecycle.

Finally, the group suggested that because of the ad hoc nature of data capture organisations are seeing it being kept in silos, with the old knowledge is power affecting the ability to share it more widely. Organisations that will be successful in the future will be those who collect and share the right data for great decision making.

We handed back to Myles to continue the discussion and he shared a slide on the whole data experience. Suggesting that in fact we need to think about data in a process fashion. He put forward a model of discover to change. Suggesting that there were indeed 4 key steps to effective data capture to data use.



The challenges to effective data capture are organisations being preoccupied with what they are doing today and not the whole user experience. Understanding what people are doing and combining that with the commercial data of costs, sales etc. Giving a much richer picture of the data than ever before. To do this effectively as a member of an organisation you must network with people outside your normal sphere of work. To design interventions that are truly understanding the problems we are trying to solve. For example, in a learning department of an organisation people are not there to deliver learning but to help solve the overall performance problems. Data therefore needs to go beyond the effectiveness of one learning intervention but to the heart of the people development to make a more effective business.

The people attending the session then went on to talk about some of the principles they would establish around data collection and what sources have been most useful to them in demonstrating impact. Some of the ideas shared were:

- Collect data once not in several places in the organisation otherwise you will spend your time trying to align the data and not make great insights from it.
- Have a single source of data often the same data is collected in a variety of systems and without fully integrated systems organisations will never be able to avoid that fact. However, what they can agree is what is the single source they will use for that data item.
- Only collect what you need
- Understand timings of data collection and potential time lags from collection to reporting
- Timing of surveys understand the best times to collect or at least ensure repeat surveys happen at similar times. For example, people may feel differently on a Monday morning to a Friday afternoon impacting on the overall feelings in a survey around business change.

Finally, the group concluded that you must act on what you find and let people know. So often low responses to surveys is driven by the belief that no change will occur as a result. An over surveyed population may only then respond when they are dissatisfied or when they feel it will make a difference.