The eLearning Coach Podcast #8
Creating a Connected and Engaged Organization
with Dan Pontefract

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Connie: Hello everyone. Welcome to episode eight. One aspect of learning that we need to understand is the impact that an organization's culture has on its workforce. Training cannot fix every problem and we need to recognize when the leaders and the environment they create is causing more harm than good. In this episode, I chat with the author of *Flat Army: Creating a Connected and Engaged Organization*, Dan Pontefract. Dan is the head of learning and collaboration at TELUS, where he is responsible for the high-level leadership development, learning, and collaboration strategy for a company of over forty thousand people. Dan champions in open collaborative leadership framework; I think you'll really enjoy the interview. Here it is.

Hi Dan, thanks for being on the podcast. It's good to have you here.

Dan: Hi Connie, I'm glad to be here. Thanks so much for inviting me.

Connie: I really love your book *Flat Army*; I was wondering what were you observing in organizations when you got inspired to write *Flat Army*?

Dan: Of course, I have a regular job and as the head of learning and collaboration at TELUS and plus my previous roles weather in corporate or in higher-ed even in K-12 for a couple years, both through those direct experiences and then working with many different partners, customers, and just being what I call a corporate academic; a heck of a lot of research that I do just for kicks quite frankly. I think that, frankly speaking, organizations are culturally broken. Ultimately, as a consequence, they're disengaged. I think leaders are practicing management techniques that predate the dinosaur; where we're at in our organizations are a level of disenfranchised where people are just feeling like a number.

Its not that everyone wants to make sixty-five million dollars a year; it's that they want to feel a part of the solution. They want to feel as though they're not just a number in the ERP HR database; they want to feel as though they're both empowered and less impoverished. They want to feel as though that they have a say in the solution that drives the organization across the finish line, whatever that may be defined as. I just really think that we're stuck in that 19th or 20th century leadership thinking, when soon enough it will be the 22nd century upon us.

Connie: I can really relate to that; I know, now I work on my own, but when I worked at organizations there was this, almost a saying, that everyone is expendable. That doesn't make you feel too good.

Dan: No it doesn't. A recent point, look in the sort of financial crisis of 2008, 2009,

and even into 2010. The Edelman trust barometer, if you're familiar with that work, where both employees and consumers, customers were asked as a result of this financial crisis, not just in Wall Street or Bay Street, but in a way in which we were operating our organizations as a result of what was going with the economic meltdown. Trust levels between employee and leadership fell dramatically; as did, consequently, trust levels from a customer to the actual organization itself. That whole notion of just a number and expandable; it just drives me personally and philosophically crazy that we don't listen and look out to the organization for ideas. A great example that I like to bring up is many moons ago, in 2003, I was working for a company called Crystal Decisions. It was a small hi-tech company that was the makers of crystal ports and eventually bought out by Business Objects, eventually bought by SAP.

The Chief Financial Officer of the day, back in 2003, was well ahead of his time and he said we're running into a little bit of difficulty when it comes to our financials and we'd like your opinion. He basically had for fifteen hundred people these open talk sessions; these, kind of, round tables in saying, how do you think we might be able to curb some of our operating expenditures over the next couple of quarters? For a CFO back then, ten years ago, to sort of have that open dialogue was really unheard of. It's still unheard of today. He was treating the team not as a number but as part of the solution and I've always loved that even when I was a young buck entering into the high-tech corporate world.

Connie: Yeah, that is so unusual. It's pretty brilliant because when you go down to the worker level people often have great ideas.

Dan: Don't they though. Google has a pretty interesting way as well where there engineers are afforded the 20% time, which is a way for them, whatever 20% time of the week they pick they can go work on projects that doesn't have anything to do with Google, if they so choose. Often these projects are just creative mind space; white space to develop Gmail or Google Earth or Google Maps. These projects that just came out of this creative whitespace; it wasn't Eric Schmidt saying, go create Google Maps; i.e. I talked down hierarchical order but it came from within from beneath if you will. That's another good example of how you can listen to your people.

Connie: Right, and drive innovation. The thesis of your book, the solution to these problems is somewhat involved but I'm guessing you have a way to explain it in a bit of a nutshell?

Dan: In essence, *Flat* is what I refer to as being on a level surface not in a hierarchy. If you think about innovation if you think about objectives and actions and you think about just daily habits I'd much rather be on a flat level surface then in a constant hierarchy. Of course, a hierarchy is going to be needed isn't it? We need someone to approve expense reports whether we're going to go buy an organization through a merger acquisition; these things have to occur in a hierarchy. I'm not suggesting we rid ourselves of hierarchy but I think our first way in which to behave should not be hierarchical it should be flat. Back to on the level surface; the second part of the

book really when you think about it is not an oxymoron but by bringing in the term army is not our first definition of what army means. Although I can see everyone saying I know what it means. Actually, I look at it from Medieval Latin and it's a word called Armada.

The Medieval Latin term for Armada actually means a flotilla of vessels sailing together; If you're flat and you have a flotilla of vessels sailing together then you have what I signify as *Flat Army* which I believe is an unobstructed flow of corporate commonality. The irony, of course, is our levels of disengagement our career unhappiness if you will our levels of distrust are so rampant and haven't changed in the past thirty, forty years I don't think we're in a *Flat Army* state. What's the solution really to your question? I think there's five key frameworks that I've woven into the book that manifests how to become on the level surface and thus flotilla vessels working together.

Those five are as follows...which is why people have said maybe this was five books. The connected leader: the connected leader is, think of a tree. A tree has three parts to it; there's the roots in the ground, which is the nutrient system in essence. There's the trunk, which is the stability, which leads then to the foliage the branches the leaves. If you think of that as what is connected leader needs to become or be or go beyond, those are what I call the makeup of a connected leader. There's fifteen key leadership attributes that I define in each of the three sections, five for each. What's the *Flat Army* connected leader DNA? The second one's called the PLF, the Participative Leader Framework, which is really a participation ethos for leaders to demonstrate something that I all C.A.R.E. Not surprising. C.A.R.E., an acronym, is you need to be continuous in your behavior, you need to be authentic; i.e. don't ghost write a blog, for example, you need to be reciprocal, so don't just take but give and you need to be always educated.

It's C.A.R.E., continuous, authentic, reciprocal, and educating. You need to do this with very direct network ways. That's the participation behavior, if you will, of the participative leader framework. You've got being connective, you've got being participative, and the next one is called the C.L.A.M. The pearl, ha-ha, of this is another acronym; it's the collaborative leader action model. The C.L.A.M. It's a daily habit for you and it's actually a six stage daily habit. It's actually six C's that form the daily habit. The first thing you do is you have to connect; it's not like the connected leader form above but you connect with people before you go and do anything.

You've got this objective that came down from your CEO, don't go and do it. Stop and connect with other people to then consider the second C, what your options may be; part of that white space, the ideation, that brain storming, if you will. Then make a decision and communicate the third C; what it is that you're about to do to whoever really needs to know from a stay collier perspective. Then you create the result, the fourth C. You then, one it's done, you confirm that you hit the mark, which is the fifth C, and lastly, ideally which we forget often in our organization, you congratulate. You connect, consider, you communicate, you create, you confirm and congratulate. That's the C.L.A.M. Those three things, the connected leader, the participative leader, and the collaborative leader are really the three key leadership behaviors, the

organizational team and individual leadership behaviors that I believe need to come into play. Then we get to the yin and yang of an organization, which is pervasive learning and collaboration technologies. If an organization is going to shift from being less of an advent and transaction and just a number of thinking then they need to shift into pervasive learning model. Which is to say that learning is and forever will be part formal informal and social just like leadership.

Connie: Okay.

Dan: There's a time for learning to be in a classroom like there's a time for leadership to say, no, I can't approve that expense report, here's why and make it a coaching session. There's lots of learning and leadership that should be occurring in informal and social ways, which then lends itself to collaboration technologies. Those who hide in an office with seven executive assistants is asinine in my life. I don't understand why leaders think they have to hide in an office, whether metaphorically or physically, and hide behind EAs, answering their emails, and not really being a part of the equation. A collaboration, technologies strategy backed by pervasive learning suggest that there are, at least, fifteen key social collaborative technologies that allow the leader to be connected participative and collaborative. Yes, there's lots of face-to-face still required but he or she that's not on the 2.0 social collaboration train is never going to get back on that train because they haven't seen why it's so important. I'm suggesting that it's a key, key part to becoming a *Flat Army* leader. Five key frameworks.

Connie: Have you seen any leaders who are willing to start to make these kinds of changes and to give up some control? How do they go about it? You can't just change, you know, from one day to the next. What are some of the first steps that they might want to take?

Dan: There's something interesting happening right now and that's with Proctor and Gamble. Alan Lafley has just been re-instituted as CEO, President, Chairperson of Proctor and Gamble after a four-year absence. He was CEO, President, Chairperson from 2000 to 2009; he retired. Since he's retired, sadly, Proctor and Gamble has kind of lost its way. Between those nine years, he increased their market value to something like over one hundred billion dollars. The most important thing that I think he did, if you kind of think about it, an example of an open connected participative flat army like leader, is he instituted something called C and D; another guy that likes acronyms, apparently.

CND stands for connect and develop. This connect and develop philosophy, this open leadership framework that ran across, not just employees, but partners was really the willingness as he says to sort of be psychologically open and, I'll quote him, "To seriously consider new ideas, whatever the source, thus building a truly open, truly global innovation network that can link up and be first in line with the most interesting thinkers and the best products to," what he calls, "reapply with pride."

There's an individual, who now by the way is sixty-five, so this is my point about it doesn't matter about age to use this kind of open thinking, is now he's back because unfortunately, they've lost their way since '09. The board comes back and says A.G., you've got to come back, help us out here because you're mentality, your thinking is just…we're missing it. As of a couple of weeks ago, he's reinstated. that's a testament to a company with 130,000 people, where he was, again, ahead of his time and now brought back to almost reinforce the point that a *Flat Army* like leader perhaps the antidote for the crisis that goes on in many of our organizations.

Connie: Wow. What if someone listening can't recognize whether their organization has a large disengaged workforce? What are some of the symptoms of a disengaged workforce?

Dan: Ha. I think we all know. I don't think there's a place in the planet where any of us have worked that there isn't a set of disengagement criteria that we've seen and recognize that oh, that, oh my gosh. For example, lets be somewhat leadership blasphemous for a second here. Let's look at Apple. Everybody and their dog speak to how brilliant a leader Steve Jobs was. I suggest to you that he was in part a brilliant leader but I also think that he was in part a harmful leader. The reason why I think he's in part a harmful leader is that he's been documented to hoard and control, to have only a select few people that he would sort of bring into the inner circle. He had a way of basically reprimanding people publically if it wasn't to his liking, whatever the specs were of the particular product.

He's hailed as a leadership icon; I think he should be hailed as a leadership innovation icon in getting the job done. He's certainly wasn't, in my opinion, an engagement first type of leader and I wonder often if he hadn't been more open and inclusive and more like A.G. perhaps, would Apple have had a foundation to continue its brilliant innovation success after his untimely death? Tim Cook is kind of picking up the pieces right now.

Connie: Right, in that case, seeing that the innovation rested with one or just a few individuals instead of across the board.

Dan: Yeah, that's exactly whereas Mayor Bloomberg, In New York, when he took over from Rudy Giuliani in 2002...and this is a kazillion, billion, quadrillionaire, right? Something, like, twenty-seven billion dollar worth man. When he got into office, he looked around and of course Rudy Giuliani had very large office, a couple of executive assistants. What did Bloomberg do? He said, no, I don't want the office, I want the largest room you have at New York City Hall and I want to put everybody in that room that I possibly can fit. As it turns out, he's got about forty-five people in the room. They call it the bullpen. Is it loud and is it chaotic and is it somewhat antithetical to how you would imagine City Hall running, or an organization? Sure it is.

If you think about it, metaphorically, philosophically, you're actually instilling the flat army mindset and philosophy there by just saying, look, I'm not going to be in an

office; he's situation himself in the middle of the room by the way with his direct reports and his many other direct reports he can fit in that room so that people can talk and move around. Sure, they've got laptops and PCS and mobile devices and they're still emailing and using collaboration technologies to continue the work of New York City. Again, almost sign of the times, back in 2002, that this is how we're going to operate; open communicatively through participation and collaboratively. I think it's another brilliant example.

Connie: That's amazing; I hadn't heard that. You state in the book that around 70% of the workforce is not engaged. There are several studies that showed that. I don't understand, why don't leaders seem more concerned about this fact?

Dan: The good ones do. So Tony Hsieh, Zappos; he built his whole entire company around culture. They started out selling shoes online, however weird that might've seemed back then. Now they're a very, very, successful organization and purchased by Amazon and the term of the deal was, don't touch our culture; let us be. There's guys like Tony that get it but of course, you're right, they're the anomaly; the Bloombergs are the anomaly, the Lafleys are the anomaly. I hope we're at a bit of a Gladwell, crazy hair tipping point. I hope that we're seeing the light that an engaged organization and team both from academic results and research as well as the good stories that resurface from Lafley and the not so great results from other organizations suggests that when one is engaged you can be happier when you're happier, you're productive, when you're productive, it ultimately creates more innovation, it's proven. It creates higher customer satisfaction, that's proven. It can create better downturn results from safety results or less time on calls in a call center.

Thus, we're talking about business profitability side. It's really irrefutable if you say, if you look at examples of organizations, if you then look at the data about where organizations that have higher levels of engagement have higher levels of profitably, less business entanglements that create this distress in the organization. It's proven. let me give you a couple of steps, Connie, can I?

Connie: Oh, please.

Dan: Here's a couple for you. A highly engaged organization has the potential to reduce staff turnover by 87% and can provide a corresponding increase in performance by 20%.

Connie: That's amazing.

Dan: It is. Here's two more for you. An engaged employee has a willingness to do more than expected 39$, a higher level of productivity 27%, better working relationship 13%, and more satisfied customers 10%. Again, of course, engaged means they're willing to stay there and go above and beyond the call of duty. They want to say good things about the company and they're feeling good about their team, their leadership, the organization, etcetera. Companies with an engaged

workforce improve operating income by 19% while companies with low engagement results see operating income decline by 32%.

Connie: Wow.

Dan: Theses are not numbers that are being brought up just because we're playing corporate bingo and here's the latest lexicon that we're going to show. We're talking about studies from whether it's psychometrics, studies from Charter Madrid Institute, studies from the Institute for Employment Studies. We've got academic researchers from Harvard, from MIT, from Lenwood School of Business, that have been looking at this stuff. I think there's a lot of leaders that don't look at the data, they don't' look at the research and then they don't look at some of the examples. To me, that's really what flat army is about; meshing irrefutable data points with examples and then complementing that with this *Flat Army* five framework model.

Connie: Right, I was wondering if you think it's possible when upper management or certain leaders are not interested in making an organization more collaborative? Have you ever seen a situation or do you think its possible for the employees to start a grassroots effort to start changing the culture?

Dan: Ha. Two things can happen of that. When it's a grassroots effort, and this is going to sound weird, but there sort of insubordinates so that it's moving towards insubordination but what they're doing is to effectively say these guys aren't with us, lets go create our own company. On company time you see, sometimes, these companies that evolve out of the company they're working for and they're like, we're going to leave now because we're disenfranchised and disengaged and thanks for paying for that startup cost; we're going to go startup over here now. That I find horribly ironic but also par for the course. More seriously, when you've got an organization that, from a ground up perspective, the smart ones then listen in and see what's going on. I think some use of collaboration technologies is a really good example of this. There were some organizations, still to this day, that ban Facebook, ban Twitter ban external social tools, right?

Connie: Right.

Dan: The stats, depending what study you read, are somewhere between 30 and 70% of organizations still ban these things; it's quite appalling. The organizations that, say, have banned it or are reticent to actually turn anything on internally; they're own micro blogging network or their own Wiki system, etcetera. When an organization has a grass roots team that has begun doing that, they sort of turn a blind eye, maybe we'll see where this goes. Then when they do see that its pumping up by their engagement or collaboration or productivity and happiness and there's this grassroots exchange going on. These smart organizations say oh, maybe we should bring this corporate wide and not just have it in that department; that Wiki system under the desk, maybe we should make that for the rest of the organization; make it ubiquitous.

Those are the more hopeful and helpful situations I think that allow it to happen. if you have a culture of fear, no amount of strawberry jam is going to make the dry toast taste better. It's very hierarchical, very rigid, very autocratic, very commanding, controlling, you're not going to get that grass roots level because people have checked out already. At least you've got sort of a culture of maybe, then you might see that manifest.

Connie: That's an interesting way to get things starting, it really is. I was really glad to see the pervasive learning model in your book and it seems like things are beginning to change. I just thought it was great that you put a name to it; I like pervasive learning model. Can you explain that?

Dan: Yeah, I've got to give that to Samuel Johnson back in 1775, of all times. He was quoted saying, "Knowledge is of two kinds. We know a subject ourselves or we know where we can find information on it." That's two hundred, and…what is that, forty years ago, roughly. Why is that important? Because even today we know stuff or we've got to go find out how we're going to know more stuff. That's what pervasive learning is; it's like osmosis where a gas can pass through a semi-permeable membrane to go leak into another volume. That's really what we're saying is, how does one type of learning pass through what seems like an impenetrable wall into another surrounding? That's what pervasive learning is; it's formal, informal, and social. We shouldn't be locked down to thinking I didn't get my two weeks of training this year.

How asinine is that? That goes back to the days of the single room schoolhouse, sage on the stage, the teacher who knows all, I'm going to sit in the desk and I'm going to wait for that learning to come to me. That's not how we all learn. If we're embracing the notion, ideally, that if leadership can be thought of as informal and social along with the formal tenants, then learning is part formal and formal social, we should be two-thirds of the time, learning in these informal and social ways. Informal, like, going for coffee, listening to this webcast, to informal forty-five minute, etcetera, hopefully you glean something and say oh, I didn't realize that. Maybe I'll share that with Jill, whoever Jill is; then the social side, right? It's no surprise that we're learning things in some of our Twitter, Facebook, YouTube world because people are sharing. Why can't we do that in the organization? I'm missing the plot. Did we have to sit there as a call center agent or a field technician or an engineer, and say, you know, Jim, my boss, never signed me up for that course this year.

C'mon. That said, it's the leadership and the organization responsibility equally to bring forward and thus have the fortitude to suggest that learning can be thought of in these informal and social ways. Going to have a coffee could be an informal coaching exchange. Why not? Reading a book, maybe it's *Flat Army*, but then its' saying hey, I really think you need to read chapter seven about the participative leader framework. Here's chapter seven for you, I downloaded it from our book service online. Go have a read and maybe we can have a talk about it; that's informal learning. Writing a blog post about the conference you attended is part formal, informal, and social. Why? Because you went to a kind of formal event, that's the conference, you networked your arse off, hopefully, at the conference, that's

informal, and the social part is you wrote a blog post about what you learned; both in the formal sessions and through the people that you networked with. Why aren't we thinking that way? It drives me nuts.

Connie: Yes, and the data shows that the forgetting curve is great after a classroom training session. I think people who are knowledgeable instruction designers or learning professional know that learning must be continuous and then pervasive is even better because that means it's coming in from all directions in your environment. I'm wondering what can a rigid organization that wants to change, what can they do to start moving towards the pervasive learning model?

Dan: I think it's a philosophy change and paradigm change first, right? The notion that all your budget in learning should be spent on formal, external, classes; that's antiquated. If your budget at your organization, whether you're 500 people or 500,000, if it's all earmarked towards formal classroom instruction or even formal eLearning, then you've got a problem. All the vendors that are out there are just having your lunch. There's so many vendors out there that are saying, hey, you need this time management course, hey, you need this Microsoft Office course. Get up out of the mindset that that's what you need. Start earmarking some of your monies, your budget, towards the informal and the social.

Take control, whether you're a Chief Learning Officer or head of HR, you're the CEO, start thinking through your budget, first and foremost, as to how you might buy facade the notion that you're only spending money on these classroom events or the eLearning courses you'll purchase from a vender and start thinking through what do we have to do to set up the right systemic process to enable that social learning, i.e. the collaboration platforms and technologies you need; or the right white space, mindset, etcetera to get some of those informal pieces going. You might have to invest for example, a mentoring system.

Your budget should be put towards that if you're internal learning budget is just thought of how you go take a course at Franklin Covey or how you go take a course at another external vendor, then you're missing the plot. I'm not suggesting to throw the baby out of the bath water here. You still need deep discussion, face-to-face, it's very important but if your mindset is that's the only place in which "I learn", and you're not demarcating budget towards that sort of split, then again, you're sort of thinking back in 1980s language.

Connie: I also think performance support which I'm not sure if that would enter into your model as informal, is something that's overlooked and that's a great way for people to be able to go beyond training; to just get the information they need at the moment that they need it.

Dan: Yeah, those are informal aids, right? It might be a book, it might be a downloadable, it might be a small audio file, it might be an article, it might be a how-to plan on a page cheat sheet; all kinds of different things. Context sensitive help things within your system at work or on your mobile device; all that stuff is really important as well.

Connie: Right. Dan, I think we should probably wrap things up then. I don't want to take up too much of your time. It's been a great conversation and I wanted to thank you for giving us the time.

Dan: My pleasure, Connie. I'm never super busy to talk about how I think the organizations can transform themselves with the tools they have today. I think it's easy; you just have to think through your leadership, your learning and your collaborative technology, your Venn diagram and figure out how to put a play into action there.

Connie: One thing I think we can keep in mind is that as learning professionals, particularly if you are fearless, you may be in a position where you can push for positive cultural shifts in your organization. It might be through leadership development or by surreptitiously Dan's book on certain people's desks. Whatever you do, I certainly think Dan is an inspiring leader in this field and that you can try and follow in his footsteps.

That's it for now, thank you very much for listening.