

Developing Knowledge

Developing *knowledge* is a primary activity for most project teams. They view training to be instrumental in the success of new processes, systems and job roles. In fact, some project team leaders would jump right to this topic with little consideration for the prior elements of the ADKAR model. Unfortunately, skipping right to *knowledge* has many implications for a project's success.

This potential pitfall is best illustrated with a case study. A customer service call center received millions of service calls each year from customers. During a major redesign of the call center's processes and systems, two initiatives emerged that would dramatically reduce the overall cost of operations.

The first initiative was a move toward customer self-service using automated telephone systems to answer frequently asked questions and to allow customers to check the status of their service orders without talking to agents. The more calls that could be handled by the automated system, the less time agents would have to spend handling these requests.

The second initiative was to introduce a knowledge-base system for all call center employees. This system would enable employees to handle a wide range of customer problems and to solve more complex issues. The knowledge-base system would provide search capability, easy access to trouble-shooting data and would allow the agents to contribute new information to

the system each day. The result was a system that would become "smarter" and more valuable the more it was used.

A different team was assigned to each initiative. For the customer self-service initiative, this team began thinking through their strategy for implementation by evaluating the customer base and considering which customers would use the automated system and which would not. They also considered the fact that customers' use of the system would probably start out low and then would increase as time went by. They understood that not all customers would feel comfortable with a menu-driven phone system. As they developed the business case for the new system, assumptions were made regarding total use of the system in the first year, the second year and so on through a five-year deployment. These assumptions helped them develop a realistic financial projection of the total savings over time.

When the customer self-service team began implementation of the system, their starting point was building awareness with customers. Communications focused on creating awareness that a new application was available. Over time, brochures, billing information and recorded messages began to focus on the benefits to the customers of choosing self-service. The team began their deployment with a focus on the first two elements of the ADKAR model, *awareness* and *desire*. They understood that the customer was ultimately in control. It was the customer's choice to use the system or to opt out and speak to an agent. As the new system was deployed, their projections and assumptions about customer usage were surprisingly accurate. Over time the business realized substantial cost savings from this initiative.

The knowledge-base team began their strategy for implementation with a carefully crafted training program for employees. They viewed *knowledge* of the new system as the success factor for their initiative and wanted to be sure that employees were adequately prepared for the cutover of the new

knowledge-base tool. As they prepared their business case, the primary focus was on the cost savings per call that would be realized once the tool was in place. They assumed all employees would use the new application.

After the new system was fully deployed, the team was surprised to find out that some call center agents were not using the new tool and that other agents used the tool infrequently.

What happened? The knowledge-base team focused on very different elements of the ADKAR model. They began with *knowledge* and *ability*. They assumed that all employees would fully utilize the new tool once it was deployed. The knowledge-base team assumed that "if you build it, they will use it." The unspoken assumption this team also made is that employees do not have a choice.

The customer self-service team, on the other hand, started with *awareness* and *desire*. They made the assumption that the customer had a choice and that the level of use would vary over time. They assumed that they needed to build awareness and desire with the customer so that they would choose to use the new self-service tool.

Each team made very different assumptions about the acceptance of the change by their respective audiences. The key lesson from this case study is that *knowledge* is not the starting point for managing change. Training by itself is not the answer. Attempts to build knowledge are effective only when the "students of change" want to engage in the change process and are seeking knowledge to help them be successful. Awareness and desire cannot be taken for granted, even in cases where the change impacts a captive audience, namely, employees that work for a company.

Creating knowledge with employees during change has other challenges for project teams. Adult learning is a complex area and is an essential foundation for developing knowledge in the workplace. Adults want to know why the topics being taught are important and relevant to them. If they cannot

connect the knowledge offered during the training to an immediate problem, then both attention to the subject and retention of knowledge can decline.¹ Moreover, if employees are not yet ready to learn and are attending the training because their supervisor required attendance, then not only do they not connect the learning to a business problem, they may not want to be in the class at all.

Adults also remember only a fraction of the training, depending on how the knowledge transfer process is conducted. Research indicates that adults retain only a small fraction of what they read, slightly more of what they hear, and about one-half of what they observe in demonstrations. The highest retention modes result from the hands-on application of the learning to an immediate problem.²

Most change leaders or project team members are not skilled in adult learning processes and are not professional trainers or educators. Yet, project teams must provide knowledge on the required skills and behaviors in order for the change to be successful. In many cases the project team will benefit by using professional training developers and instructors to support these programs.

The following section outlines some of the most commonly used tactics for developing knowledge.

Tactic 1 – Effective training and education programs

Tactic 2 – Job aides

Tactic 3 – One-on-one coaching

Tactic 4 – User groups and forums

Tactic 1 – Effective training and education programs

Training programs are a primary channel for creating *knowledge*, but must be properly designed and delivered. In a business setting, training programs should include hands-on

activities and demonstrations with less focus on lecture time and reading. Audio programs, web-based seminars and other multi-media programs should all be considered as viable ways to develop knowledge, but be aware of the limitations of these types of programs compared to hands-on activities. Concepts can be conveyed with multimedia channels, but retention around tools and processes will be highest when these tools are discussed and applied during the learning program.

When designing training programs, an assessment of the knowledge gaps that exist between the current state and the future state will need to be completed. This gap analysis illustrates what is missing between what people do today and what they will have to do tomorrow. This is a normal part of the training development process. However, understanding the knowledge required for making the transition is equally important and often overlooked. Rarely do changes simply happen as an event. During the transition, many old processes and systems will need to be used concurrently with the new processes and systems. Problems will likely arise that do not match what employees learned in training. Training requirements and the resulting training programs should address how to operate in the future state and how to transition to a new way of doing work.

A useful technique for assessing gaps between the current state and future state is to write new job descriptions for employees. The new job descriptions should detail the knowledge and skills needed to perform that role both during and after the transition. With the direct involvement of supervisors, these job descriptions can be used as a tool to determine the knowledge and skill gaps between the current state and the future state. HR can play a vital role in this process.

Finally, time the training to be as near to implementation as possible. Remember that retention will drop off sharply as more time passes between learning new skills and applying those skills in a real situation.

Tactic 2 – Job aides

Many types of knowledge content go beyond what people can easily remember. Job aides such as checklists and templates enable employees to follow more complex procedures. For system implementations, online help files and scripts serve this same role. These job aides could be in the form of paper documentation or quick-reference cards. When integrated into system software, job aides can be made context-sensitive, similar to how some popular software companies use their animated assistants to provide tips and help. Knowledge-base systems or trouble-shooting systems that offer online help tools are also useful ways to provide job aides to employees.

Tactic 3 – One-on-one coaching

Even with the most effective training programs, most employees need one-on-one coaching. Because individuals learn in different ways and at different paces, one-on-one coaching allows a trainer to provide customized education based on the unique obstacles faced by that individual. In some cases, the barrier to learning may not be related to the content, but to other issues. When formal training is over, this “trainer” is often the employee’s direct supervisor.

For example, when a marketing company deployed new desktop software, the learning curve for some senior editors appeared to be very long. After sitting down with one of these editors, the supervisor noticed that this person typed with only two fingers and rarely used the mouse. Since the new application required advanced PC skills, including keyboarding and mouse aptitude, this editor was having difficulty learning the new software because of their low proficiency in typing and using the mouse. The barrier to developing knowledge was not related to the subject content of the new system at all, but rather a unique personal obstacle for this individual.

For one-on-one coaching to be a success, supervisors or designated mentors need to be equipped to serve in this capac-

ity. In-depth training or previous experience with the change is needed. You want to ensure that the knowledge transferred by the coaches is correct and complete. If this is not possible with your current managers, then one-on-one coaching can be accomplished by providing access to experts on the change. These experts could be from the training group or they could be from outside the organization. They also could be expert users from another part of the organization.

A franchise submarine sandwich restaurant provided an excellent example of the use of experienced employees to coach new hires. I personally experienced a new employee who was interrupted by a fellow employee when my sandwich was being made incorrectly. Instead of reprimanding the new employee, a co-worker stopped what he was doing, demonstrated the technique to the new employee and then explained why it was done that way. As a customer I certainly did not mind the additional 30 seconds the process took, and appreciated having my sandwich made correctly. Moreover, I was pleased to hear additional questions from the new employee that were answered patiently and in such a way that I thought it was just part of the normal process of doing business.

One-on-one coaching will be critical to your training program. In many cases, employees are taking the training course weeks or months before they will personally implement the change. Knowledge can be forgotten over time. Knowles found that there is a time perspective as people mature in terms of retention of knowledge. In other words, the older we get, the greater the need for immediacy of implementation after training.¹ Because not all training classes can be provided in a “just-in-time” mode, one-on-one coaching provides immediate transfer of knowledge at the time of implementation.

Tactic 4 – User groups and forums

Learning from peers can be very powerful. Employees identify with and can relate to the experiences of their fellow workers.

User groups and forums are a channel for employees to teach one another. System implementations often use the concept of “super-users” to designate a collection of employees who have mastered the implementation of the tools and can teach others. These super-users typically have their own forum for sharing, and organize forums for other employees that are new to the implementation.

For example, call centers often use agent forums to share knowledge about new systems, processes or tools. Within these forums, call center agents share their experiences; how they handled different situations and how the tools assisted them. One vendor was surprised to learn that the agent forum actually identified more shortcuts for moving from one screen to another than the vendor knew existed. The agent forum provided a robust and ongoing education process that augmented what they had learned in training.

User groups and forums capitalize on experiential learning of employees. Experiential learning is much more effective to adult learners. Merriam and Caffarella³ note that adults accumulate a growing reservoir of experience that is a rich resource of learning. User groups and forums can tap into this resource and empower employees to be part of the learning process.

Developing a solid knowledge foundation for your change will require a combination of traditional training, job aides, one-on-one coaching and effective peer mentoring. When used together, these techniques allow employees to develop knowledge and apply that knowledge in a just-in-time mode to support the change.

Frequently asked questions regarding knowledge

Is the term knowledge in the ADKAR model the same as training?

Knowledge as used in the ADKAR model refers only to the information and understanding on how to change. Training programs, on the other hand, commonly include hands-on applications and simulations that facilitate ability. In other words, well-designed training includes knowledge transfer and the practice needed to apply this new knowledge to real situations.

Can the development of knowledge cause someone to lose desire to support the change?

Newly acquired knowledge about the skills and behaviors needed to support a change could negatively influence an employee’s desire to engage in that change, but this is more likely to occur when the employees were not well-informed about the nature of the change and “what’s in it for me” in the first place. In other words, the coaching process failed to build awareness. If employees learn for the first time how the change will impact them in a training class, then they may change their mind about supporting the change. Training should not be used as a substitute for good coaching from their direct supervisor.

What is the difference between knowledge and ability?

Knowledge represents the cognitive understanding of specific information about the change, as well as an understanding, at an intellectual level, about how to change. *Ability* is the demonstrated capability to implement the change. For example, I may know how the game of tennis is played after watching a tennis video or by taking a class taught by a tennis professional, but that does not mean I will be a good tennis player. Teenagers may understand the fundamentals of driving a car based on a

“safe-driving” program, but that does not make them good drivers. *Ability* is the transformation of knowledge into action to achieve the desired performance within the organization.

Summary

Developing knowledge requires a broad spectrum of activities that enable each person to learn in a way that is most effective for them. These activities should include:

- Formal training and education programs
- Job aides that are available in real time once employees are back on the job
- One-on-one coaching from supervisors or subject matter experts
- User groups and forums (peer groups to share lessons learned)