

## ***Making a Difference with Making a Difference: Incorporating Dialogue Education™ into an Organizational Change Consulting Practice***

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I operate a small consultancy which helps large and small government and business organizations make significant organizational or process improvements. Because of my IT experience, I am often called upon to clarify business requirements and facilitate organizational change for IT projects. The business's mission is to help organizations build great collaborative partnerships, both inside the client organization and with external partners, to achieve big, bold goals which were previously thought to be impossible. Lately, we have worked with clients to address the challenges of sustainability and climate change.

Since taking my first Dialogue Education™ course in 2006, and getting great follow-up coaching and suggestions from the instructor (thank you, Darlene!), I find that opportunities to apply the Dialogue Education™ principles crop up on nearly every consulting project. I also find that, as I apply the Dialogue Education™ principles, I deepen my understanding of them, and then find even more ways to apply them. (Hmm...something called "praxis" here?)

Here are some brief stories about my experiments—and experience—putting Dialogue Education™ to work for my clients, and learning in the process. Hopefully they will contain elements that are helpful to other Dialogue Education™ practitioners.

### **Story 1: Big project, impossible goals.**

*The situation:* I was hired by a 20,000 person social service agency to lead a team to help managers and staff adjust their processes and staffing levels to a new automated system for paying medical providers. The system project was large, complex, expensive, and affected people in multiple divisions and offices of the agency. In addition to helping the organization make its "business transition" to the new system, the organizational change manager also wished to develop skills and knowledge among agency staff so they could continue the organizational change and process improvement work we had begun, after the system was installed and operating. Members of my team were already at full capacity, barely keeping pace with the project schedule and needs of the individual offices we were working with. How could we design, organize and provide this training on top of what we were already doing?

*The response:* I brazenly volunteered to lead this training effort. (What was I thinking?) With some initial conversations with the organizational change manager about general content and the amount of time for a class, we set a date for the first full-day training session. After sufficient time passed that I

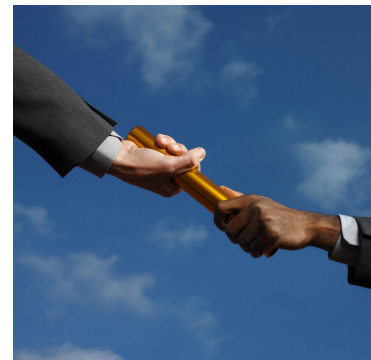


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could no longer ignore looming deadlines, I got to work on a “seven steps” design document. I got some help from administrative support in sending out a survey, to supplement the Learning Needs and Resources Assessment information I was gathering from managers and staff I worked with, and from discussions with other members of my team.

I distributed the design to the other four team members, and asked them which of the learning tasks they would be most comfortable leading. We also met face-to-face to discuss the design, the principles behind it, and who would take on which topic. I wasn't sure whether every member of the team would actually take on a topic. I was pleasantly shaken from my resignation and apathy about this when each member of my team signed up for something. I only had to lead two of the ten modules! This led to each team member rephrasing and restructuring somewhat the learning task(s) he or she took on. In many cases, this led to simplifying and clarifying the learning task. Sometimes, it wasn't entirely as I had envisioned the task. But this approach built a powerful sense of team work and joint ownership over the entire training program, provided learners with a variety of perspectives on the knowledge, skills and attitudes being addressed, as well as varying the presentation style and pace. At the same time, the overall design was cohesive, used several Dialogue Education™ principles and practices, and kept the learners active and engaged. The training evaluations at the end of the session indicated high levels of learner satisfaction with the course, and increased confidence in their own ability to do business process and transition planning work. The client's organizational change manager declared, “Finally, we get to have some *fun* in our training!”



*The learning:* Inviting others to collaborate on refining and delivering a Dialogue Education™-based training design can have several benefits. It can spread the work load. It can build ownership and commitment to the design, and the Dialogue Education™ approach to learning. It can showcase other members of the training team as “experts” in their content areas, so that learners call on them in the future for advice and support, spreading the responsibility for follow-up.

On the “improvements” side, not all participants responded to the LNRA survey. Additional time either interviewing them or following up to ask for their response could have helped us be more responsive to their needs in the training session. In addition, the design and delivery could have been smoother and had greater impact with more in-depth orientation to Dialogue Education™ for training team members. Finally, team members could have been asked to help with the transfer and impact dimensions of evaluation. Anecdotally, there were indications that some participants put the content to work right away, and others, not so much. However, we didn't do a very good job of following up on the transfer and impact dimensions of evaluation. Asking the other members of my team to help with this could have provided some useful follow up information, as they already had relationships with various participants, or would be working with them shortly.



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## Story 2: Small organization, huge mission.



*The situation:* I was hired for an organizational alignment project by a small regional non-profit which was working with policy makers and business leaders across several states to promote changes in environmental policy and practices. The organization was expecting a major increase in funding and demand for its services within the coming six to twelve months, and wanted to improve the cohesiveness of its team and alignment of all parts of the organization with key components of its organization's mission. Discussions with the Executive Director led to a decision to use an innovative approach to clarifying, refining and managing commitments between individuals and program teams. So, a key component of the project became training all managers and staff on this approach.

*The response:* Because it combines action with learning, I selected the Dialogue Education™ approach to providing this training. This would give us an opportunity to have participants raise and start to resolve organizational and team commitment questions as they were learning the approach. I developed a seven-step learning design, working with a consulting colleague steeped in the commitment management approach we selected for the project. We conducted in-depth interviews with each staff member before finalizing the design. We also reviewed the design with the organization's Executive Director before delivering it.

We had planned to deliver two training sessions. During the first session, we did not complete all the content we had planned. Factors which contributed were the amount of content we incorporated into the learning tasks, and the discussions which ensued from the "reporting out" steps from some of the learning tasks. This led to a redesign of the second training session, simplifying some of the content, and combining some topics. Because of significant discussions about how the organization needed to function and align itself, we still were not able to complete all of the "content." But did we ever get engagement!

This resulted in managers and staff having adequate foundations in the commitment-based approach to organizational design. We then were able to use this approach with the client team to review and assess alternative approaches to restructuring their organization. They made some fundamental choices about dividing responsibilities, committed to some standard communication and collaboration practices, and began building a shared language for making requests and offers to one another.

*The learning:* The Dialogue Education™ principle of linking learning to action (praxis), and the practice of building a sequence of learning tasks which produce integration into the learner's daily work and life, connects very well to helping organizations change and grow. Because of its use of learner interaction, along with learner choice and commitment for applying the learning, Dialogue Education™ is especially congruent with a commitment-based approach to process design and organizational alignment. Dialogue Education™ provides a great structure for staff to engage productively with each other to address organizational change. It also provides great tools for channeling that engagement into adopting new practices and behaviors, at both individual and organizational levels.



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I also learned several things to improve about designing and delivering training using Dialogue Education™, especially applicable in an organizational change context. Three of those lessons were:

First, don't presume any knowledge on the part of participants on why they are there or what the purpose of the training is. I did an introduction to the "Who" and "Why" sections of the design; it turned out to be too generic, not specific enough for the managers and staff attending to grab onto. This became an issue for both sessions—about half the participants were walking around not knowing why we were talking about requests and commitments, but not speaking up. This was not fully resolved until mid-way through the second session. A more specific introduction, along with a task early in the first session on the training goals and participants' reason for being there, could have reduced uncertainty and resistance on the part of some participants.

Second, I learned (again!) from this experience the importance of keeping the content manageable and doable for the timeframe. I continually want to cram too much into the time available. (They have to know all this! Think of how much smarter and cooler and more successful they will be if they get all of this other stuff too!) Not only does too much detail in the content make it more difficult to finish everything, it actually confuses people and makes it less likely that they'll relate their learning to their work. So my colleague and I simplified and reduced content from the first to second session. Clearly, there is more to do to keep the content direct and manageable!

Third, if follow-up work is required after training to reinforce skills and to facilitate implementation of the decisions made, get this commitment at the start of the project. My colleague and I recommended such follow-up work about mid-way through the project. The organization found it difficult to commit because of the small budget dollars available at the time. Including it in the initial project budget may have improved the chances that follow up would actually occur.

These are two experiences that gave me a much deeper appreciation for and commitment to using Dialogue Education™ in my daily work and practice. It has helped me design and deliver training with a much higher level of confidence that it will be effective. As a result, I have re-introduced training as a service offering for my business, and am in the process of adding training design services. Dialogue Education™ also helps me hone my consulting and facilitation skills, by making me more aware of several factors which directly affect my work and practice:

- differences in learning styles,
- the importance of finding out where my audience is and starting there,
- my role as a structurer of experiences rather than a depositor of content, and
- the payoff from carefully walking through with clients a set of "seven steps" for each project (especially WHO, WHY WHAT WHAT FOR, and HOW).

As I strive to make a difference for my clients, Dialogue Education™ has truly made a "difference in my difference!"



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