The Nuts and Bolts of Digital Transformation

How to plan for transformation, the power of interpersonal collaboration in driving change, and the importance of giving employees space for transformative learning.
STRATEGIZING ABOUT DIGITAL CHANGE in your organization won’t get you anywhere unless you’re making plans and setting goals that people will actually execute. But most senior executives struggle to establish realistic expectations, largely because they don’t have a clear sense of how or why employees on the front lines adopt new tools.

Those are problems you can fix, says Paul Leonardi, a professor of technology management at the University of California, Santa Barbara, in the opening article of this special report. By understanding the six phases of digital adoption, Leonardi explains, leaders can strategize in reverse. That entails knowing what the tools can achieve in local performance gains — and then working your way back to define meaningful company objectives and secure what’s needed to get things rolling in the first place: employee buy-in.

To spark transformation, it’s also critical to boost employee engagement and collaboration, according to Rob Cross and Wendy Murphy at Babson College, and Amy Edmondson at Harvard Business School. Their analysis suggests that certain leadership behaviors, such as creating an environment of trust and imbuing work with purpose, determine how effectively people collaborate, how engaged they are, and how readily they embrace new ways of working.

Leading digital change involves giving employees space for transformative learning, as well. They need a low-risk “playground” to imagine who they might become, not just what they can do differently, says Gianpiero Petriglieri, an organizational behavior professor at INSEAD. Petriglieri points out some of the biggest obstacles to such learning and explains how organizations can make it easier for individuals to explore uncharted territory in the quest for development and growth.

— The Editors
YOU’RE GOING DIGITAL — NOW WHAT?

ENOUGH WITH THE TOP-DOWN STRATEGIZING. UNDERSTAND HOW CHANGE REALLY HAPPENS ON THE GROUND — AND PLAN FOR IT ACCORDINGLY.

BY PAUL LEONARDI

At the 30,000-foot level of the corporate suite, plotting digital change is heady, exciting stuff. Business leaders can almost smell the gains in efficiency and speed and the data-driven increase in customer satisfaction when they think about all the new tools at their disposal and how they might restructure their organizations. As one senior executive at a large telecommunications company recently told me, “Mapping out a new approach to compete in the digital era has been so cool!”

But here’s the decidedly less cool, more mundane truth that I’ve learned after 16 years of working on such transformations with more than two dozen companies across eight industries: Success depends less on strategic inspiration than on the way people on the front lines implement new digital tools, and most leaders aren’t laying a foundation for those employees to succeed. In large part, that’s because senior managers don’t have any idea what really happens at the ground level. So they’re caught by surprise when tools don’t get used the way they’re supposed to be (or even at all), data-driven insights prove unremarkable, and anticipated gains fail to materialize. Their digital transformations become digital flops.

To avoid that fate, leaders must understand how digital tools come to be used widely and effectively so that they can create an environment that provides optimal conditions. They can’t hand that work off to IT and hope for the best.
In this article, using an automotive company’s effort as an archetypal example, I’ll describe how digital transformations tend to be experienced and processed by those on the ground and then show how reverse planning — working backward from that reality, phase by phase, to set broad corporate goals — leads to change that sticks. Plenty of articles offer theories about and strategies for digital transformation. This one will help you anticipate and manage the gnarly, often-ignored details that destroy many a well-intentioned plan.

**THE PHASES OF DIGITAL ADOPTION**

Most digital transformation efforts are launched with extensive rollout plans that outline activities such as financing the transformation, reorganizing the company to make it agile enough to get the most out of digital tools, developing data-driven insights that allow the company to deliver more customized products, and reducing time to market.

All of that is critical. But so is another process, one that doesn’t get mapped out with similar rigor. I like to refer to it as the Work Digitization Process, or WDP for short. (See “How to Plan Your Company’s Transformation.”) This is a set of six interlinked phases of ground-level change that must happen for a digital transformation to take off. More often than not, these phases build upon one another, so early wins presage later successes, while early failures make each ensuing phase more difficult. To see how the process unfolds, and to clearly understand the impact of management action (or inaction), let’s look at how things played out at one major international automotive design company that we’ll call Autoworks.

**PHASE 1: Leaders sell the digital transformation.** Without widespread buy-in from employees, any major change initiative will wither and die. Digital transformations are no different. That’s why the first step in a successful effort is to explain the benefits of digital change to the workforce, which may or may not be receptive to altering standard operating procedures.

The leaders of Autoworks understood this. Like many companies in the automotive industry, Autoworks had embarked upon a digital transformation in the mid-2000s. One goal was to accelerate product development while cutting costs in resource-intensive areas. To launch a single new model, for example, Autoworks would crash-test at least 30 preproduction vehicles. Each test cost roughly $750,000. New digital design tools, however, could cut that figure drastically by allowing engineers to build and test virtual cars on their computers. Even better, those simulations would allow the engineers to collect more data, further optimizing their ability to design better, safer, cheaper cars. Eager to get started, Autoworks’ senior leaders beefed up the company’s supercomputing center and licensed a slew of digital design applications. The CEO declared, “We’re going to be a digital company.”

Senior leaders were vocal and clear about the change they wanted. Moving performance testing onto digital applications meant that product development could get done faster and cheaper. Directors heard “faster and cheaper” in their staff meetings, managers heard “faster and cheaper” in their division meetings, and engineers heard “faster and cheaper” over and over from managers, directors, and executives in training sessions, at conferences, during all-hands meetings, and in everyday work. “Faster
and cheaper” became the mantra of the digital transformation.

Studies show that employees listen when senior leaders broadcast goals and announce bold initiatives for achieving them. Early on, such pronouncements create frames of reference that people use to understand the technology they’re being asked to implement. If you asked employees at Autoworks how they would know whether new tools could transform the organization, they would (and often did) answer, “I’ll know if they help me build simulation models faster and cheaper.”

**PHASE 2: Employees decide whether to use the new technology.** Once leaders have brought digital tools to the company, touted the anticipated benefits, and adequately funded training, they fully expect that employees will shift their work to the new applications. There’s no guarantee that will happen, though. My research has shown that roughly 40% of potential users decided not to use the technology, even when it was mandated by their direct supervisors.

That’s a big number — big enough, in fact, to derail a digital transformation. So it’s important for leaders to understand why so many employees might make that choice. I’ve found that it’s typically not because the technology is inadequate (it’s usually pretty good) and not because training is poor (ditto). Rather, employees consider whether the technology enables them, as individuals, to carry out the goals announced by the company’s leaders. At Autoworks, that meant that the engineers asked themselves, “Will this software help me develop new car designs faster and cheaper?”

As it turned out, not everyone thought it would, so “faster and cheaper” was more complicated rhetoric than Autoworks’ leaders had imagined. The phrase inadvertently encouraged people to compare the new tools with the old ones they knew inside out and could already use quite efficiently. Some of the company’s top engineers, who served as early adopters, did just that — and decided that it was in their company’s best interest for them to stick with the tools they were already using, because the new software actually slowed their work down. Although they could see that it had other distinct advantages for the organization, they rejected it for failing, in their experience, to create the gains that company leaders had deemed most important. Making matters worse, other engineers decided that if a colleague they respected had rejected the new software, they didn’t even have to give it a try. The early experimenters thus became negative influencers in the network of company engineers, although their comfort with the old tools may have tainted their perception of the new ones.

Of course, senior leaders had intended that “faster and cheaper” would be seen as the broad goal of the transformation effort. They hadn’t considered how those words might scan at various levels and influence granular decision-making. That’s why senior leaders must take great care in crafting their rhetoric. If it doesn’t match up with the reality of how work gets done, their prized new technology won’t get implemented in the way they hope.

**PHASE 3: Employees decide how they will use the new technology.** Even if the new technology encounters a band of naysayers, the many employees who do make the switch will come to a second critical decision: how to use it. This, too, is a complicated choice with significant long-term ramifications.

Almost any digital technology, whether for businesses or for individual consumers, can be adopted in many different ways. (Think of Microsoft Excel, for instance, with its hundreds of features and possible uses.) But in a digital transformation, the features people choose to apply are deeply consequential, because they determine what kind of data will be recorded, produced, or analyzed, and how that data will be used.

Autoworks’ leaders believed that data was a key benefit of moving design processes into a digital environment. The use of simulation tools would make it possible for engineers to run hundreds or thousands of iterations of crash tests or noise and vibration tests. By comparing all those results, engineers would be able to optimize a vehicle’s design with far more sophistication than when the company ran a few dozen wrecks with crash test dummies. At least, that was the theory.

For one year, I tracked two departments that used the same digital tool for automating simulation designs. In one department, engineers engaged with the tool in widely varying ways, according to individual preference. In the other, every engineer used the same features in the same order. By the end of that year, the vehicles designed by the latter group were outperforming those created by the former by
a 2-1 margin. Why? Because the data produced by the engineers who had followed the same path with the same features had a uniform foundation and could be analyzed for patterns of effectiveness. The engineers who had followed their own paths produced just as much data, but the information arose from varying assumptions and choices. These kinds of differences around the company made it difficult to create a set of best practices for the new digital tools. If a central value of digital technologies is the creation of data that can be mined for efficiencies and other valuable learning, shaping consistent usage patterns is essential.

**PHASE 4: New kinds of data change the way employees behave.** In its pre-digital days, Autoworks had developed a handoff approach for moving data across the company. In the case of vehicle design testing, the standard operating procedure went like this: Engineers conducted crashes and various other tests, collected the data, and passed it along to the data analysis group, where analysts tried to glean universal principles for good vehicle design. There were engineers; there were data analysts. The difference between the two groups was clear.

Remember those engineers who used the new digital simulation tools in consistent ways to produce comparable data? They’re the ones who started to change the status quo. They could see the results of their own tests, of course, and could examine results in the aggregate. But they went a step further and started talking to one another about their results and thinking about them together. As one engineer commented, “Now that we’ve gone digital, our roles as design engineers are changing.” Instead of being siloed away from one another while they ceded analysis to an equally siloed data analysis department, the design engineers had become a collaborative team of data analysts.

Some “by the book” managers tried to curtail this empowerment by insisting on keeping analysts’ and engineers’ responsibilities separate. But this process — of more and better data changing tasks, resulting in changed roles and relationships — is an inevitable byproduct of digital transformations. At their core, relationships between people in different roles are based on data. When employees start performing new roles because they have new data and information, they necessarily start interacting with different people. The result is the formation of new and initially invisible social networks. According to some research, these powerful new networks may be the most important ingredient in driving digital transformations.2

**PHASE 5: Performance improves locally.** There’s often a dichotomy between the targets business leaders impose for their digital transformations and the benefits employees experience at a local level.

Once they were effectively using the new digital tools and comparing results with others in their emerging social network, Autoworks’ engineers started to see concrete gains that they could appreciate. For instance, they found that it was becoming easier for them to optimize designs to improve such key variables as crashworthiness and fuel economy.

The process of moving from testing to final design solutions improved significantly as well. In fact, according to my analysis, engineers who changed their roles to incorporate data analytics and shifted their social networks to interact with other engineers solidified the design of their vehicles 23% faster and with 31% fewer laboratory tests than engineers whose roles didn’t change. In other words, engineers were working faster and cheaper, after all.

That sounds like the kind of success Autoworks’ leaders had been hoping for. It is, but with two important caveats. The first, of course, is that 40% of engineers had initially rejected the software because they hadn’t found it obviously faster and cheaper. The second is that those engineers who did achieve faster and cheaper gains arrived at them via metrics that mattered to them in their roles, like design quality improvements. If senior executives had customized...
their rhetoric early on to resonate with engineers’ own experience of their work, they might have motivated more engineers to adopt the new digital tools sooner and secured even more significant gains.

PHASE 6: Local performance aligns with company goals. A digital transformation gets traction when it meets key corporate goals by employing technologies that improve local processes and results.

One reason Autoworks chose to focus intently on vehicle design is that 20 years of robust statistical analysis had identified that process — along with supply chain, regulatory compliance, and manufacturing efficiency — as critical to reducing the time it took to get cars from concept to dealer. Better time to market would accelerate top-line growth.

Needless to say, the company was happy that the technologies led to faster and cheaper designs. Rather than sit on its laurels, however, Autoworks conducted a deep analysis of how the gains had been achieved. That’s how it discovered the remarkable value of the social network that had been unleashed by the new design software: Engineers who spent three times more hours discussing vehicle design with one another than they spent instrumenting their rhetoric early on to resonate with engineers’ own experience of their work, they might have motivated more engineers to adopt the new digital tools sooner and secured even more significant gains. local activities have the most potential to transform your company? Many corporate leaders know where they’d like their company to go, but few have a clear sense of how to get there. Identifying the local activities with the highest potential to transform will affect which digital tools you bring in, inform how you lay the groundwork for implementation, and buttress your efforts to rally the company behind the changes you seek.

First, you’ll need to assemble and analyze your company’s data about what kinds of local outcomes best drive big organizational goals. For instance, I once worked with a large children’s hospital that received many emergency transfers from community hospitals and had identified an urgent need to improve survival rates for these vulnerable patients. Digging deep into its data, the children’s hospital discovered an undeniable link between transfer patients’ survival and the quality of the initial diagnosis before they arrived. Seeing this link allowed the hospital to target a specific solution: a digital platform...
that allowed community hospital physicians with little expertise in pediatric emergency care to record details about a child’s physical condition that could be easily read by the expert nurses and physicians at the children’s hospital, making it easier to appropriately triage transfer patients.

After you identify local activities that can drive success, it’s important to measure the impact of your digital efforts in order to improve them. Sometimes those metrics are clear: The hospital knew it was succeeding, for example, when survival rates for transfer patients increased significantly. When the metrics aren’t so obvious, it helps to break down whatever process you’re trying to improve into discrete steps.

For instance, one large financial services company I worked with was intent on increasing knowledge sharing. That’s a pretty multifaceted process, so we broke it down into several steps, like helping employees accurately identify experts and communicate with those experts. Then we launched surveys to gauge how accurately employees assessed one another’s expertise and what volume of communication between people best facilitated knowledge transfer. With those baseline scores in hand, the company implemented an enterprise social networking technology that allowed employees to see what other people were working on. By tracking changes in the two measures every six months, we were able to monitor the progress of the knowledge-sharing initiative. That kind of local data is essential for any digital transformation. It’s the only way to know whether behaviors deep within the company are enabling or hindering your change effort.

2. How can you foster information flow and behavioral change in your organization? Business leaders must create an environment that encourages and allows their people to achieve the local performance gains that will drive transformation. To make the most of powerful new data and analytics, employees need to be able to change tasks, roles, and social networks fluidly. Leaders can free them up to do so by understanding information flow and removing institutional obstacles to the positive social change that follows an injection of powerful new data.

How does a diagnosis of information flow help? Consider the example of a large public utility I worked with. The company saw great potential for a new digital technology that allowed for remote monitoring of utility consumption. By constantly measuring usage and sending repair crews out preemptively, the utility could avoid disastrous failures of transmission equipment. But how could the information flow within the company ensure that this preventive maintenance actually took place? The billing department, which already monitored usage on a monthly basis, would have to coordinate with the maintenance department, which was accustomed to increasing and decreasing the number of workers on the clock according to peaks or valleys in demand. This meant that some employees in billing would have to shift from being mere data aggregators and bill producers to being analysts (much like the engineers at Autoworks). Recognizing this, company leaders set up training sessions, established new targets for employees who made the transition, and hired new employees who already had these skills. In the wake of this effort, a new social network arose consisting of employees devoted to preventive maintenance, and the digital transformation proved a great success. This kind of diagnostic work is often called organizational network analysis; it’s one of the most useful and unheralded tools for digital change.

As the example makes clear, it’s not enough for business leaders to know who will be employing the new technologies. They also have to know how groups of employees currently interact, so they can support the new social networks that are so critical to success. One of the reasons employees don’t end up collaborating with the right people during a digital transformation is that their formal roles are misaligned with their emerging roles. If you don’t enable a formal role transition for your employees and codify the changes by altering job descriptions and how you evaluate people’s performance, they will be unmotivated to develop the skills to be good collaborators with their new social network partners.

3. Who are your key influencers, and how can they help your culture become digitally ready? Remember those key influencers at Autoworks? Most helped drive adoption of the new digital tools, but a sizable minority became naysayers who led colleagues to avoid the new digital tools altogether. By identifying influencers before the launch of a digital transformation, you can enlist them in your efforts to
broadcast the promise of the coming digital change.

I once worked with the leaders of a large medical device manufacturer that was about to embark on a digital transformation entailing the introduction of new technologies and a significant structural reorganization. They had a big problem: A faction of midlevel executives opposed the effort. The leaders worried that if these naysayers dragged their feet, they might sink the transformation in a bureaucratic mire.

Based on the Work Digitization Process, I knew that the best way to counter this opposition was to recruit the company’s key influencers. Influencers aren’t necessarily the most popular people or those highest on the food chain. More often than not, they’re central players in the informal advice-seeking networks of the company. To identify them, I conducted an organizational network analysis by asking employees two simple questions: “Whom do you go to for advice about technical issues?” and “Whom do you go to for advice about strategic issues?” That helped identify the 10 key influencers in each business unit.

It was then important to turn as many of them as possible into proponents of the new changes. I started by interviewing each one and learning about their initial reactions to the change. Some liked both the new digital tools and the reorg; others thought both were terrible; and a third group was mixed — they liked the reorg but not the technology, or vice versa. I then developed an internal marketing plan for each group. Working with the company, I provided hard data that supported the first group’s inclination, giving them something concrete to point to when evangelizing. Company leaders and I then met with the second group to show how the changes could amplify the positive aspects of their current work patterns and discuss ways that things they didn’t like could be improved. We provided the third group with examples of how the reorg and the new technologies could build on each other to drive significant change. That solidified support and won over quite a few skeptics. We deepened the influencers’ involvement by asking them to help us generate the messaging that would convey the benefits to the bulk of the workforce.

We didn’t win everyone over. But taking the influencers seriously paid big dividends. In the business units where we worked with influencers, the company saw a more than 75% adoption rate for the new digital tools; in the few business units that we didn’t work with, less than 25% of employees got on board.

BEHIND THE GLIMMERING PROMISE of becoming a digital company lies a stark reality: Implementing digital technologies to create meaningful change is hard work. To make a digital transformation take off, business leaders have to first understand the internal chain of events that is set off by the introduction of new technologies. Only then can they lay the groundwork for success, working from the end of that chain (those places where local improvements can drive big corporate goals) to the beginning (where business leaders exhort the workforce to support a massive digital disruption of the status quo). Success doesn’t automatically arise from sparkling rhetoric and bold promises. Instead, it depends on decisions made by employees on the front lines. The reverse planning outlined in this article will help them make the right choices.

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REFERENCES


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Consider these two companies: The first is a retail chain with hundreds of locations globally — innovative, but basically a sales platform. The second is a hospital that treats the world’s most devastating cancers. Which do you think has a more engaged workforce?

If you chose the latter, in light of its quest to save lives, you wouldn’t be alone. Yet, when we spent time with both organizations, we discovered that the working environment in the hospital was rife with fear, workforce morale was low, and employee turnover was high. At the retail chain, on the other hand, there was a palpable spirit of camaraderie, employees were energetic and enthusiastic, and customers were very pleased with the service. The retailer had the more engaged workforce by a long shot.

It’s a common misconception, both in businesses and in management articles and books, that a sense of purpose is what matters most when it comes to engaging employees.¹ Many leaders concerned with attracting and retaining top talent believe that nothing motivates people as much as the larger good they might be doing or the chance to change the world. Accordingly, they extol the higher virtues of their companies’ missions and the meaning of the work they offer.

But our work with more than 300 companies over the past 20 years, particularly our research

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In creating contexts of high behaviors that foster trust, the research on which this article is based in two phases over the past decade, with two consortia of leading organizations.

In the first phase, through organizational network analysis, they assessed collaboration patterns and identified relationship drivers in several dozen global companies across industries. They also mapped the role of trust, purpose, and energy in building relationships and in creating contexts of high employee engagement and low turnover.

In the second phase, the authors interviewed 200 leaders (100 women and 100 men) across 20 well-known companies to identify leadership behaviors that foster trust, purpose, and energy in interpersonal interactions.

using organizational network analysis (ONA) and our interviews with executives, reveals that purpose is only one contributing factor; the level and quality of interpersonal collaboration actually has the greatest impact on employee engagement.2 In this article, we’ll explore why collaboration has that effect and which behaviors you can adopt and practice to nurture it.

The authors conducted the research on which this article is based in two phases over the past decade, with two consortia of leading organizations.

THE POWER OF INTERPERSONAL COLLABORATION

For all its success, it’s doubtful that Silicon Valley-based Workday would win a “most inspiring mission” contest. The company, after all, is a developer of software as a service (SaaS) solutions for financial management, human resources, and planning. But you would never get that impression inside this $2.8 billion, 11,000-employee company: Of the companies we studied, it had the most engaged workforce. When we interviewed people from the top of the house to the front lines at Workday, we found a consistent, clear sense of commitment to reinventing enterprise software, and a level of energy and enthusiasm that was missing in many other companies with very noble missions.

Workday’s leaders place a high premium on interpersonal collaboration. “It’s part of the fabric of how we hire people,” says senior vice president Greg Pryor, the company’s people and performance evangelist. “We look for people who are already oriented toward being empathetic and seem like they would be able to put themselves in service to colleagues and customers.”

The effort to build collaboration among Workday’s employees begins on their first day on the job, with technology-enabled curated connections that pair each new hire with a veteran employee called a workmate. One of the tasks assigned to workmates is to help new employees “find their tribe” — that is, to identify and connect with other employees who have similar values and interests. Our research shows that this bridging of networks (helping people make connections across an organization) is a highly predictive factor in employee retention.

Workday’s efforts to derive value from interpersonal collaboration are not just a mechanism for acculturating new hires. They continue throughout the tenure of every employee, including leaders. Workday’s leadership development programs are designed to help foster connection building and nurture relationship networks throughout the company. At their annual People Leadership Summit, for example, executives and managers are intentionally seated next to people from different functions and at various levels of seniority whom they wouldn’t normally meet.

Workday’s focus on collaboration has paid off. Employee attrition at the company is strikingly low, and 95% of employees say it is “a great place to work.” Indeed, Workday ranked fourth on Fortune’s most recent 100 Best Companies to Work For list.3 Workday is an exemplar of interpersonal collaboration, but it doesn’t stand alone. Using ONA to map the relationships in groups (for more detail, see “Making Interpersonal Collaboration Visible”) and examining those findings against attrition data as well as surveys and interviews on engagement and satisfaction, we have found that, at Workday and across companies and industries, employee engagement is determined by the ability of leaders to foster interpersonal networks and a culture of collaboration.

How can you establish and nurture high levels of collaboration and engagement in your company? It’s a tiered process: First, you lay a strong foundation by identifying, adopting, and rewarding leadership behaviors that enhance psychological safety and trust. That is a necessary, but not sufficient, condition.

MAKING INTERPERSONAL COLLABORATION VISIBLE

Organizational network analysis (ONA) can illuminate the quality of interpersonal collaborations by offering insights regarding how influence is dispersed among group members within and across organizational boundaries, hierarchical levels, and job functions. It is a sort of MRI that can reveal where interpersonal collaboration is healthy or ailing, and who is responsible for its condition.

ONA can identify a variety of collaboration builders, including connectors, who link people together; experts, whose knowledge and skills support others; brokers, who span boundaries and integrate subcultures; and energizers, who instill passion and excitement in others. It also can identify collaboration destroyers: de-energizers, fearmongers, and other hobgoblins who spread cynicism and slow momentum, often in subtle ways.

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Once trust is established, you must instill a sense of purpose — the conviction that the work being done has meaning and impact. And once purpose is established, you must generate energy — a day-to-day enthusiasm within the workforce. (See “Three Steps to Productive Collaboration.”) When we overlay engagement responses on network analyses, we find that leaders who took these steps saw greater engagement than leaders who didn’t.

BUILDING SAFETY AND TRUST

Trust encourages and enables people to take risks and collaborate in pursuit of aspirational goals. Without trust, people hold back. With it, their reservations dissipate and information flows freely. People openly discuss possibilities, willingly offer their ideas, and help others.

Leaders can make it easier for employees to trust them and one another by establishing psychological safety — the feeling that people can offer constructive criticism or a new idea in a group setting without risking disapproval or rejection. Such safety is what psychologist Frederick Herzberg labeled a hygiene factor. It cannot create high levels of interpersonal collaboration on its own, even though it’s often presented that way. But if it’s absent, it’s impossible to take the first step toward facilitating collaboration.

In other words, when you create psychological safety, you are easing off the brakes and enabling trust, but you aren’t yet pushing the gas pedal and motivating people to collaborate. To do that, you need to generate purpose and energy in the organization (the second and third tiers of the process, which we discuss below).

Three kinds of trust are essential to effective interpersonal collaboration:

- **Benevolence-based trust** stems from psychological safety and the underlying belief that leaders and colleagues will act with your interests in mind, not just their own.

- **Integrity-based trust** stems from the belief that others will be consistent in word and deed.

- **Competence-based trust** stems from the belief that others have the expertise they claim.

The need to nurture trust is a nearly universal blind spot among leaders. Over the past 22 years, when we have asked groups ranging from 30 to 450 executives to vote on the individual behavior they most need to adopt — one that builds trust, one that instills purpose, or one that generates energy — only about 2% of the participants vote for trust. But when we do the equivalent of 360-degree surveys for leaders, we find lots of distrust in their organizations,
including complaints about leaders not following through on promises, withholding information, and behaving in self-serving ways.

These complaints are not always grounded in reality, but most employees will not directly confront leaders or ask for clarification regarding their intent. Thus, trust is further eroded.

A senior investment banker told us, “As I look at the behaviors that help build trust rapidly, I am sure I don’t think about them or do them enough.” She’s probably right, and she’s not alone.

A number of leadership behaviors establish and support trust. (See “The Leadership Behaviors That Nurture Collaboration” for the 27 behaviors that promote trust, purpose, and energy in organizations.) For instance, although leaders are usually advised to “walk the talk,” when it comes to trust, they also must “talk the walk.” That’s because nurturing benevolence- and integrity-based trust requires communicating who they are and the intent of their actions in clear, unambiguous ways. When leaders walk without the talk, they leave employees guessing, and in work situations those guesses often take a negative cast. “People have so many different ways they can misinterpret what I am doing or make inferences about my intent,” a manager at a pharmaceutical company told us. “If they just have a slightly better sense of who I am and where I am coming from, this kind of frenzy is less common.”

Competence-based trust can be problematic, too, if leaders are unwilling to admit that they don’t know everything. When a senior executive we interviewed was brought in to turn around a division of a high-tech company, she initially struggled to master the technical side of the business. But then she realized it made more sense to leave the technical expertise to others on her team and focus on strategy and team building, two areas in which her skills were extraordinary. “In part this made me vulnerable and let others do the same,” she told us. “But telling the team what I was not good at also ensured their trust in me when I did indicate an area I had experience in.”

Trusted leaders spend a good deal of time in one-on-one meetings with employees. One Workday manager told us that he devotes at least half the time in these meetings to “off-task” topics that have nothing to do with work timelines or deliverables. “Once I know what people care about and where they want to go, I can shape their work to line up with their aspirations,” he said. “Of course, as they see this, their reservations about who I am start to fall away.”

All forms of trust benefit from personal connection. Workday encourages managers and employees to connect through 141 sponsored clubs that encompass interests such as a cappella, cheese, karaoke, K-pop, paintball, and powerlifting. The company also encourages employees to connect with one another through sports and community involvement. These nonwork connections build trust and a sense of camaraderie.

**PROMOTING PURPOSE**

Once people have a sense of trust, it is much easier for leaders to widen the aperture and show employees how the work they do matters to the organization and the outside world. Leaders accomplish this not only by giving people inherently meaningful tasks (which isn’t always possible) but also by creating a context for meaningful collaboration.

That’s what David Sylvester has discovered. In a career that has included leadership roles in the Marine Corps and for-profit companies, Sylvester (who currently serves as Amazon Web Services’ director of new employee success) has conducted a number of ONAs to identify the predictive social network drivers of things such as revenue generation, speed to productivity, information and decision flow, collaborative overload, engagement, and retention. This work has resulted in a wide range of targeted talent management, leadership development, and organizational effectiveness initiatives. In one organization, he began an analysis with a simple question: “When you interact with this person, do they leave you with a greater sense of purpose about the work you do?” It revealed, in an anecdotal confirmation of the Pareto principle, that 80% of the sense of purpose within the organization was generated by just 20% of its leaders and that these leaders had, among other things, a significantly better record of employee retention than the rest.

He then examined how these particular leaders were instilling an enhanced sense of purpose among employees. “It was all behavioral — and very teachable,” Sylvester recalled. The organization took the ONA findings, including the ability of effective leaders to, as Sylvester put it, “provide
more clarity behind tasks,” and incorporated them into its leadership training programs for executives and other parts of the workforce.10

We used ONA to identify the instillers of purpose in a leading investment bank by asking its top 600 leaders, “Who among you leaves you feeling a greater sense of purpose in your work after an interaction?” The results showed that the top quartile of leaders created a sense of purpose for nearly 16 people on average — a strong span of influence. (The bottom quartile gave a sense of purpose to less than one person, on average.) Moreover, the leaders in the top quartile were able to attract higher performers to work for them, saw lower attrition rates, and had teams with higher engagement scores.

A number of leadership behaviors promote purpose in a team or an organization. For instance, leaders can highlight the “why” of an assignment or a project.11 When Gen. Dwight D. Eisenhower issued his statement to the troops on D-Day in June 1944, he focused on the context, telling the combatants that his statement to the troops on D-Day in June 1944, he focused on the context, telling the combatants that theirs was “the great crusade,” that “the eyes of the world are upon you,” and that “the hopes and prayers of liberty-loving people everywhere march with you.” He wanted them to know why their actions mattered. This sort of context setting is standard in the military, especially when people are being asked to risk their lives, but not so much in business, where the stakes are usually considerably lower. But managers can use this approach to create a context in which people see the value in what they are doing and feel a part of something more meaningful than, for example, meeting a deadline or staying within a budget.

What is less understood is that at least one aspect of “how work is done” plays an essential role in instilling purpose. Our research suggests that as much as half of employees’ sense of purpose and impact comes from the quality of their interpersonal collaborations. Thus, leaders should help employees see purpose as embedded in how they work together, not just in the execution of work itself. For example, one C-level leader at a Fortune 500

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### THE LEADERSHIP BEHAVIORS THAT NURTURE COLLABORATION

By using organizational network analysis (ONA) to identify leaders who are good at nurturing collaboration, and interviewing them and the people they work with, we found 27 behaviors that build trust, instill purpose, and generate energy.

#### 10 TRUST-BUILDING BEHAVIORS

- I make others want to turn to me for transparent, credible expertise.
- I acknowledge areas in which I am not an expert.
- I create rich interactions at key points in projects.
- I actively encourage others to critique and improve my ideas.
- I offer time, resources, information, referrals, insights, and other assistance before I ask for help and without expectation of benefit.
- I connect with people off-task, seeking to understand their backgrounds, interests, and aspirations.
- I consistently communicate my values and priorities.
- I do what I say I am going to do and follow through on commitments I make to people.
- I am committed to principles and goals that are larger than my own self-interests.
- I keep confidential or revealing information to myself.

#### 11 PURPOSE-INSTILLING BEHAVIORS

- I help people clarify and pursue meaningful career objectives.
- I help structure work to align with others’ career aspirations.
- I establish the importance of work (the “why”) before the tactics for accomplishing it (the “what” or the “how”).
- I co-create solutions and diffuse ownership early.
- I encourage people to be attuned to and synchronized with the demands their colleagues face.
- I show appreciation for others’ work.
- I encourage fun in work.
- I reframe negative interactions to focus on work worth doing.
- I encourage people to find purpose by helping others.
- I coach people to collaborate at a certain pace and in cycles that allow them to work at their best.
- I encourage people to find purpose in their work through networks inside and outside the organization.

#### 6 ENERGY-GENERATING BEHAVIORS

- In meetings and one-on-one conversations, I engage others in realistic possibilities that capture their imaginations and hearts.
- I am typically fully engaged in meetings and one-on-one conversations, and show my interest in others and their ideas.
- I create room for others to be a meaningful part of conversations and make sure they see how their efforts will contribute to an evolving plan.
- When I disagree with someone’s plan or a course of action, I do so in a way that focuses attention on the issue at hand and not the individual.
- I use humor — often at my own expense — to lighten tense moments or remove unnecessary status or politics from interactions.
- I maintain an effective balance between pushing toward a goal and welcoming new ideas that can improve the project or the process for reaching a goal.
company makes it very clear among newly formed teams why she invited each team member to join a project or an initiative: “It helps them appreciate each other and see why all of them together will be more successful than any of them could be alone.”

There are other behaviors, too, that are common to leaders who successfully instill a sense of purpose. They tend to diffuse ownership early, making the pursuit and achievement of shared goals a cooperative undertaking from the beginning. They also show appreciation for others’ work. One pharmaceutical executive with whom we worked set aside an hour at the end of each week to send thank-you notes to employees who made a particularly important contribution in a collaborative way.

**ENERGIZING PEOPLE**

Once the tiers of trust and purpose are in place, leaders can turn their attention to energizing employees. This is the process of motivating others to bring their best selves to work and fully engage with colleagues. Research shows that energy is a key stimulator of high-quality work connections and collaboration.12

Leaders who can generate energy and enthusiasm, a relatively rare talent in work settings, are enormously valuable to their organizations. Indeed, our research finds that energizers are four times as likely to receive an organization’s top performance ratings and be promoted than nonenergizers. They are two to three times as likely to successfully manage career transitions. And, on average, their compensation, including bonuses, is 20% to 30% higher.

Energizers provide the jolt needed to quickly produce novel outcomes and speed the transfer of knowledge. This makes them highly effective change agents. But that jolt can be delivered in a strategic manner only if organizations recognize their energizers and deploy their special skills.

This is easier said than done. You might expect energizers to always be the most charismatic people in a room or the funniest or the best storytellers. But they can be tough to spot. The most outgoing people are just as likely to be de-energizers as energizers, and energizers are just as likely to be introverted as extroverted. Our interviews with energizers reveal that they don’t distinguish themselves by being larger than life but by making other people feel as if they matter and creating flow in networks so that information, opportunities, better talent, and creativity move more fluidly through an organization.

The obstacles to identifying energizers by personality traits mean that companies need other ways to identify them. Again, ONA can help. At the Broad Institute of MIT and Harvard, a biomedical research organization, Kate O’Brien, director of people analytics, used ONA to find the energizers among two groups of employees (approximately 400 out of 1,500 total), many of them scientists, in the Cancer Program and the Data Sciences Platform groups. “There are these people who are connectors — hubs for other scientists,” said O’Brien. “They’re really essential people who, should they decide to go somewhere else, we would start to feel enthusiasm and mission-focused collaboration falling off in the culture.”

The results of the analysis were a surprise to the institute’s senior leaders, according to O’Brien. The list of energizers included quite a few scientists who weren’t winning research grants and who weren’t necessarily perceived as technical superstars. But they had other valuable attributes: The energizers saw people as individuals. They always took time to talk to colleagues and help them solve problems. They instinctively recognized that other scientists appreciated being cared about, and they took on that task. These behaviors are among several key leadership behaviors that we’ve found energize employees.

Humor is also part of energy generation. Many energizers use a self-deprecating approach to lighten moments or to lower the natural barriers that arise in interactions with authority figures. They look for opportunities to inject levity into work and encourage others to do so, too. One pharmaceutical manager told us that he asks a different team member to start each meeting with a humorous ad or video involving a company in an unrelated industry. The idea is to get people to laugh and relax a little — and not take themselves too seriously.

Leaders often underestimate the power of energizing behaviors. But throughout our study of energizers, we’ve found that their success is driven not by their ability to make things happen but by their ability to attract ideas, opportunities, and talented people. These things may seem to flow to them through serendipitous encounters, but energizers open the channels through which success flows.
HOW DO LEADERS MOVE FORWARD?

Inevitably, when we present our findings to groups of leaders, someone asks the question on everyone’s mind: “What’s the one behavior I can adopt today that will raise the level of collaboration in my organization?” Unfortunately, for a couple of reasons, there isn’t a simple answer to that question.

First, the effectiveness of the 27 behaviors identified in our analysis varies based on the dynamics within a given organization. That said, they all contribute positively and often work in combination. The more of these behaviors leaders exhibit and celebrate in others, the more likely their organization is to have high levels of collaboration. Conversely, if there are missing behaviors, the gaps can become stumbling blocks to the establishment of trust, purpose, and energy in the workforce — no matter how many of the other behaviors are present.

Second, every leader exhibits these behaviors in different combinations and different magnitudes. This means that the solution to raising the level of interpersonal collaboration will differ for every leader.

Instead of searching for a silver bullet, we invite you to assess your leadership behaviors by noting which of the 27 you exemplify and which you don’t. Then, starting with the behaviors that create an environment of trust, adopt the ones you currently lack and continually refine the rest. We’ve found that this systematic approach is the best way to become a better driver of interpersonal collaboration and employee engagement.

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REFERENCES


10. Any opinions expressed by David Sylvester are his own and not those of his current employer.


13. Try taking our survey at www.networkassessments.org/thriving-through-connections. For a fuller picture, you also can invite the people you work with to take the survey and assess your behaviors. In return, you will receive a report showing the degree to which you exhibit each of the 27 behaviors.
The event was running over, the car was waiting, but the keynote speaker did not seem to mind. He was enjoying fielding questions from a large auditorium packed to the rafters with executives, aspiring entrepreneurs, and management students. “Get ready for an age in which we are all in tech,” he had told them, “whether you work in the tech industry or not.” The moderator called for one last question. “What’s the best way to get ready?” a woman asked. “Be great at learning,” he said without hesitation. “The moment you stop learning is the moment you begin to die.”

Calls for learning have long been common at corporate retreats, professional conferences, and similar gatherings. But with the furious pace of change that technology has brought to business and society, they have become more urgent. Leaders in every sector seem to agree: Learning is an imperative, not a cliché.
Without it, careers derail and companies fail. Talented people flock to employers that promise to invest in their development whether they will stay at the company or not. And companies spend heavily on it. By one estimate, in 2018, corporate outlays on learning and development initiatives topped $200 billion.

Despite the lofty statements and steep investments, however, learning at work remains complicated. People are ambivalent about it, if not outright resistant. We want to learn, but we worry that we might not like what we learn. Or that learning will cost us too much. Or that we will have to give up cherished ideas.

There is often some shame involved in learning something new as an adult, a mentor told me at the start of my career. What if, in the process, we’re found lacking? What if we simply cannot pick up the knowledge and skills we need? I have spent two decades studying adult learning, helping companies design and deploy learning initiatives, and teaching and coaching thousands of high potentials and executives all over the world. And I have found that mentor’s words to be wise: Nothing truly novel, nothing that matters, is ever learned with ease.
Furthermore, most organizations are not as hospitable to learning as their rhetoric suggests. In my work, I hear the same complaints over and over again:

“My manager does not care about learning.”
“Pressure to perform trumps our need to learn.”
“We are told to celebrate failure as a learning opportunity, but I never feel that I can afford to fail.”

Even though we want to learn and companies need us to, it’s hard, and we get little space for it. Part of the problem, I have found, is that we often think of learning as something that happens at work or alongside it. We seldom acknowledge that learning is work — work that, paradoxically, gets harder in successful careers and organizations, where shame is most unwelcome.

So how can employers make space for learning, and how can we as individuals tackle the work of learning, especially the sort of learning that transforms careers and organizations? Both endeavors require understanding that learning is plural. There is more than one kind, and each kind needs its own space and challenges us in different ways.

LEARNING IS PLURAL

Andrew and Sandra (names have been changed) were getting into trouble for not learning fast enough. He was a talented product manager who, after yet another performance review in which he had been told that he should learn to delegate if he aspired to move up the ranks, had come to resent his company for not helping him prepare for senior leadership. She was a respected executive who was running afoul of her boss, the company’s CEO, for not pushing a digital overhaul of her division fast enough. Despite their history of strong performance, both were saddled with a perception that they were not agile enough (management-speak for “stuck in their ways”). They both read widely, attended courses, and sought advice. But none of those efforts seemed to get them unstuck.

When I met Andrew, it did not take him long to admit that he did not really want to change. He took pride in being a problem-solver and had long been rewarded for it. As a result, when he passed a problem to his team, he felt embarrassingly useless. No wonder he could not learn to delegate. It threatened the habit — the virtue, as he saw it — of self-reliance that had been prized in all his roles thus far.

Learning threatened Sandra in a different way. Her accomplishments had taken her to the top of her company’s largest division, where she was responsible for a significant portion of the organization’s profits. Pressure to keep the ship steady came from the same boss who urged her to “rock the boat,” from her colleagues, and from the thousands of people whose livelihood depended on her division’s results. Trying something too new felt reckless in her role.

Stories like Andrew’s and Sandra’s are common. The pull of habits and the push of expectations are familiar to anyone who works hard to earn others’ trust. It is not just pride or fear that keeps us stuck. It is also the shame that comes with being exposed and letting others down. The more valuable our identities and commitments are, the less space we feel we have to question them. On the contrary, we shore them up, developing ways to keep potential shame at bay, such as focusing on performance and the organization’s demands.

Managers could be forgiven for concluding (like Andrew’s and Sandra’s bosses did) that we are not learning much when we proceed this way. But they would be wrong.

We are all, in fact, learning every day. Most of that learning, however, is incremental, improvements that build on what we already know and do. We expand our knowledge and refine our skills in ways that strengthen our identities and commitments. Hardly a day went by that Andrew and Sandra did not solve a new problem: A process got fixed, a region got reorganized. Each time, their bosses pointed them to another problem to solve, or they spotted one themselves. The process sharpened their competence, broadened their expertise, and got them attention. Each day they got better — and a little more stuck.

Learning that broadens our expertise is valuable, but it is not enough. Incremental learning does not alter the way we see others, the world, and ourselves. Therefore, we do not just miss opportunities to accelerate that learning. We often miss learning of another kind altogether, the kind that scholars call transformative because it changes our
perspectives and relationships, laying the foundations for personal growth and innovative leaps. Incremental learning are necessary, of course. Incremental learning helps us deliver, while transformative learning helps us develop. When we make space for the former and avoid the latter, however, frustration ensues, change stalls, and investments go to waste.

MAKING SPACE
The kind of space we need for learning, and the way to make the most of that space, depends on what kind of learning we are after. For incremental learning, we need a more focused, less distracting, safer replica of our workplace — a boot camp of sorts, where we can practice the best possible way of doing things, get feedback, and try again. If we are after transformative learning, what we need is a familiar yet open frame — a playground of sorts that magnifies our habits and the culture that breeds them so that we can examine both, and imagine and try new ways of being.

A boot camp must replicate workplace constraints to help us master ways of navigating them more efficiently. Whether it’s a course on, say, reaping insights from data analytics or a training session on giving respectful feedback, the space supports practice and improvement. A playground must remove most constraints to promote experimentation. Providing some distance from day-to-day reality allows us to get real in a deeper sense. A boot camp amplifies and exploits the shame of learning, helping us learn how not to be found wanting. A playground exposes and challenges that shame, helping us realize that if we were less anxious, it might be easier to claim what we want and discover how to get it.

That’s what Andrew and Sandra needed but didn’t have. Both were insightful. Andrew understood the classic trap of talent: What got him noticed as a future leader got in the way of becoming one. Sandra feared the curse of successful executives, which is being seen as a monument to the past that stands in the way of the future. What they did not get was that to make the leap forward, they did not need to master a new way to act but rather a new way to learn. They both put emphasis on trying to find out what they needed to do better. They had plenty of resources for that. What they did not have was a space where they might be different without risking too much.

That’s often a problem in organizations. Even when they make space for learning, as in executive education programs and management retreats, they favor incremental learning. Boot camps cater to the performance mindset and focus on conformity at the office. Furthermore, the kind of learning they support works well for a broad range of skills but not for learning to lead or ignite change. To help people shift to a new way of being at work, we need more open spaces such as leadership development workshops or strategy retreats where we are purposefully disoriented — spaces where we are freed up to question the status quo within and around us and invited to try out different directions.

Most organizations promise to help their members learn, but only those that provide both kinds of learning will succeed.

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**INCREMENTAL VERSUS TRANSFORMATIVE LEARNING**

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of spaces truly keep that promise. We value and
often remain loyal to them even after we leave, be-
cause they offer “identity work spaces” where we
can learn to fit in and become who we aspire to be,
as well as learn what it takes to deliver and what we
need to develop. In such spaces, there is focus on a
broad vision and freedom to bring the vision to life
in our own way. But even when organizations rec-
ognize that learning is plural and provide spaces for
incremental and transformative learning, effi-
ciency and change are not guaranteed. Ultimately,
learning is practice. We need to do the work to
make the most of the spaces we are given — the
work of learning from experts and experience.

DOING THE WORK

I have never met a manager who told me that peo-
ple learn to succeed, lead, or change by reading
articles like this. You learn from others whose ex-
pertise you lack and from personal experience, they
say. I can’t argue with that. But most people also
admit that while we have expert mentors and plenty
of experience at work, we do not always have so
much learning, and change remains hard. That will
continue to be the case until we discover how to
make the most of the experts and experiences in
our learning spaces.

Transformation might well happen at a boot
camp, and we might get “fit” on a playground. But
any overlap in benefits is incidental. The spaces are
fundamentally different, and so are the types of
work they require:

Incremental learning through deliberate prac-
tice. In a boot camp, where incremental learning
prevails, we align our habits with established norms,
conform to the ideals laid out by experts and organi-
zational authorities, and thus reinforce the existing
power structure. In this whole endeavor, the experts
are central. They set out conceptual models, serve as
role models, guide us in drills, and correct us.

First, as learners, we study the past and the lessons
drawn from it through academic research or corporate
benchmarking. Then we bring in the future — the
aspirations our leaders have outlined in our career
plans or in corporate strategy. That mixture of past
and future defines the ideals we will strive for. We
then consider the present to define the gaps in skills
we need to fill with deliberate practice.

Boot camps allow us to examine our experience,
to judge what we lack and learn how to act differ-
ently. In these spaces, however, we seldom inquire
why we had an experience, where the ideals come
from, what makes them ideal, what they afford us,
and what they cost us. For the purpose of incremen-
tal learning, those lines of inquiry are impractical
and inappropriately subversive.

Transformative learning through reflective
engagement. In playgrounds, where transformative
learning prevails, the work involved is reflective en-
gagement. There, we are not just allowed but actually
expected to subvert the power structure. We put ex-
erts to the side and our experience front and center.

Playgrounds often provide a clear frame for ex-
ploration but leave it broad enough that there is not
one single way to fill it. The frame outlines what
could be without prescribing what should be. It
may be as simple as a call for innovation or inclu-
sion that lacks detail on what kind of innovation to
pursue or who to include. Such calls may seem
abstract through the lens of incremental learning,
because they offer little guidance about what to do,
but they are liberating seen through the lens of
transformative learning, because they leave room
to define what to do.

The ability to learn from experience in the pres-
ent — from moments, not models — is just what is
needed when the past has become a hindrance and
the future is unclear. Experts still play a role in
transformative learning, but a supporting one; they
encourage our engagement and gently guide our
reflection. The work is easier said than done: We
pay attention, have a conversation, and then let in-
terpretations inform experimentation.

Since this way of working with experience is less
familiar than the deliberate practice outlined above,
let us break it down with the help of a group of exec-
utives from a tech company that I shall call Star.

TRANSFORMATIVE LEARNING IN ACTION

I met the Star executives in a formal learning space,
a workshop designed to support a companywide
strategic shift. The transformational intent of the
workshop was clear to everyone — leaders must
change before their company can — and consistent
with the new direction the organization was taking.
Overtly, there was a great deal of support for change.
And yet, most of the executives involved agreed that the company was not changing as fast as they had hoped. They felt the clock ticking and wanted to discuss what they should do differently. They had little appetite to do what was needed most: slow down and understand why they acted the way they did before experimenting their way toward lasting change.

That became clear as participants, divided into groups, engaged in a simple exercise. Each group had to build a contraption to retrieve an object from a bounded enclave. They all had competence in excess and plenty of resources. The only pressure came from competing with teams of their peers. It is easy to dismiss such exercises as unrelated to the complex real world. I find that to be a flimsy defense against noticing, voicing, interpreting, and coming to terms with what is real about those activities — the way people think, feel, and act while working together. There is nothing more real, and consequential, than that in the world of work.

Notice the experience. The work of transformative learning begins with the simplest but most radical of steps. Pay attention to your experience in the present — the hum within, the buzz around. Notice where your attention flows. What is easy to see and do? What are you missing or leaving out? Try to set aside the past and the future; pause the what-if train of thought. Use your brainpower to notice what is in as much detail as you can.

As one of the Star teams approached the assigned task, executives took note of the large amount of material available and conceptualized two different contraptions, both of which would work. Resources were distributed within the group, and two prototypes were built. The team decided to test the simplest one, which won the competition. The atmosphere was full of activity and stilted at the same time. People were tired, but they kept going until we made time to talk.

**Voice it.** Share your experience and inquire about the experience of others. Start from what you see around you, but don’t neglect what you sense within. Keep noticing as you discuss, with an ear to the variety of experiences in the same moment and place. Are there any patterns in who is seeing and sensing what? Keep judgment at bay. It is easier, and more fruitful, to learn from patterns of experience if you can approach them with an open, curious mind.

Once they started sharing what they had noticed, most of the group members seemed to agree: After realizing that they had two viable ideas, they had felt obligated to prototype both. And once the prototypes were built, they both had to be tested, even though the contest had been decided. More than one person admitted mixed feelings about it. They were proud of being creative, but it was also exhausting, let alone unnecessary, to do all that work twice. There was no trophy for a “second win.” One executive said that it had seemed inefficient, but he chose not to mention it at the time. Someone else asked, Why did they feel compelled to keep going? That question moved the work toward interpretation.

**Interpret it.** Ask yourself why you and others are having those experiences. Continue to resist judgment about what should or could have happened or what you need to do next. Focus on the meaning of your experience. Look at the data and linger on the why. Try to come up with interpretations that challenge the usual excuses: “We were short of resources; we did not have time; that is just the way we are.” How did you help sustain the status quo?

When they began wondering why they had kept working and ignored their own doubts, the first interpretation the Star executives landed on was “pride.” That felt plausible but incomplete. It could not just be pride, reasoned one participant, because
their creativity had been on full display and their execution was successful the first time around. Why keep going? “Some of us would have been embarrassed otherwise,” a proponent of the second prototype said. It became clear that not wanting to shame others or to be shamed had been a major driver for the group, one that had kept them going even when it was not necessary.

**Own it.** Once you put aside interpretations that focus on external factors, you can begin to learn a lot about yourself and the people around you. Here you can bring past and future, your relationships and culture, into the conversation at last. How do your history and aspirations explain what is happening? What do the events unfolding say about your relationships with others involved and about the culture you share? Try to make links between those levels. Looking at experience as an expression of personal, relational, and cultural habits will yield insights about sources of resistance to, and avenues for, change.

To be without ideas, or to have ideas that wouldn’t work, would be as embarrassing in the exercise as it was in their daily jobs, several Star executives admitted. They were the senior leaders of a successful tech company, after all. And since they did not want to be caught in that shameful place themselves, they also avoided putting others into it. Passing on an idea was spoken of as “killing it.” Seen that way, product choices became existential threats.

People throughout the company felt and acted similarly in their day-to-day jobs. They took great pride in their creativity, hard work, and concern for one another. Their company’s culture valued “caring, indefatigable doers.” Fitting that profile reassured people that they were bright and useful. It also cost them a great deal of effort. And it made the imperative to stop what they were doing and change feel like a condemnation of their competence rather than an opportunity.

If upon reading this you are wondering whether Star is a pseudonym for your company, let me tell you a secret: I have witnessed the same pattern in many organizations. I have seen it in teams at established companies and at startups, with young high potentials and C-suite executives, with groups of men and women alike. “We wanted to give everyone a chance to shine,” managers usually tell me at first, when I challenge their obvious overwork. But what they set up, really, is not a level playing field for contributors; it’s a thick layer of busyness that disguises the organization’s deficits, because the thought of overcoming those weaknesses through learning induces shame. Seen that way, overwork is not the cause of our struggle to learn but a consequence — a defense mechanism.

**Experiment.** There is freedom that comes with transformative learning. If you can notice, voice, interpret, and own your experience, you can also begin to imagine how to change it. Once you have one or more plausible hypotheses out in the open, it is time to test them to confirm them, to dissuade yourself of their truth, or to refine them. All of that can be done through little experiments aimed at eliciting new experiences and drawing further conclusions.

At Star, executives looked for small ways to prevent overwork without inducing shame and ways to find and offer affirmation without using project approvals and successes as proxies for it. For example, one executive told me months after the workshop, “I keep asking myself and others, ‘Are we doing this because it is really necessary or because it would be embarrassing not to do it?’” Using this question as a prompt for reflection helped him distinguish between those activities driven by a sense of obligation and those that truly advanced his business unit’s strategic goals. He had also begun publicly praising people who stopped doing things that did not make sense or, more precisely,
that made sense only from the perspective of the old culture. “We can give up the overwork without giving up pride,” he kept repeating. The employees in his unit were grateful for the new mantra.

THE BRAVE LEARNER

I often meet people who say they want to learn from experience and really mean it, but they find that it is hard to muddle through without clear parameters. They want to be told what to focus on, assess their progress (and be assessed), and have a plan for putting what they’ll learn to immediate use. That response is understandable, and it’s compatible with incremental learning, which fosters alignment at work. Incremental learning makes us fit the mold. But transformative learning makes us misfits. It invites responsible subversion. That takes courage. It takes courage to own our complicity in the status quo, and it takes courage not to remain captive to it. Just as shame impedes learning and hampers leadership, having the courage to learn gives us the courage to lead.

Transformative learning does not transcend incremental learning, however. It lays the foundations for it. Transformative learning sets us free to envision and create a new future. Incremental learning makes us stronger as we pursue it. We might not be able to do both at the same time, but we are better off doing both over time.

Once we begin to master both ways of working with experience — deliberate practice and reflective engagement — they produce less shame and more courage. People who regularly make room for both types of learning, especially under pressure, eventually no longer need to be offered formal learning spaces. They make every space a learning space.

Doing that work on an ongoing basis develops attention, curiosity, and imagination — virtues that enhance one’s current leadership and one’s future expertise. And once we are brave enough to care for our own learning, we usually begin to care for others’ too, becoming the leaders that every organization needs and every employee deserves.

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