Design Powerful Habits for Effective Action Learning

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Learning Objectives

Participants will:

- Connect current knowledge about continuous quality improvement to the context of engagement and working strategically
- Understand "Improvement Kata " as a practice of CQI implementation
- Develop powerful habit design skills for effective action learning

Why powerful habits?
Why action learning?

Five Reasons to Design Habits for Powerful Action Learning

Streamline and improve efforts –>
Identify small problems early and often

Connect your work to an aspirational vision –>
Eyes on the prize

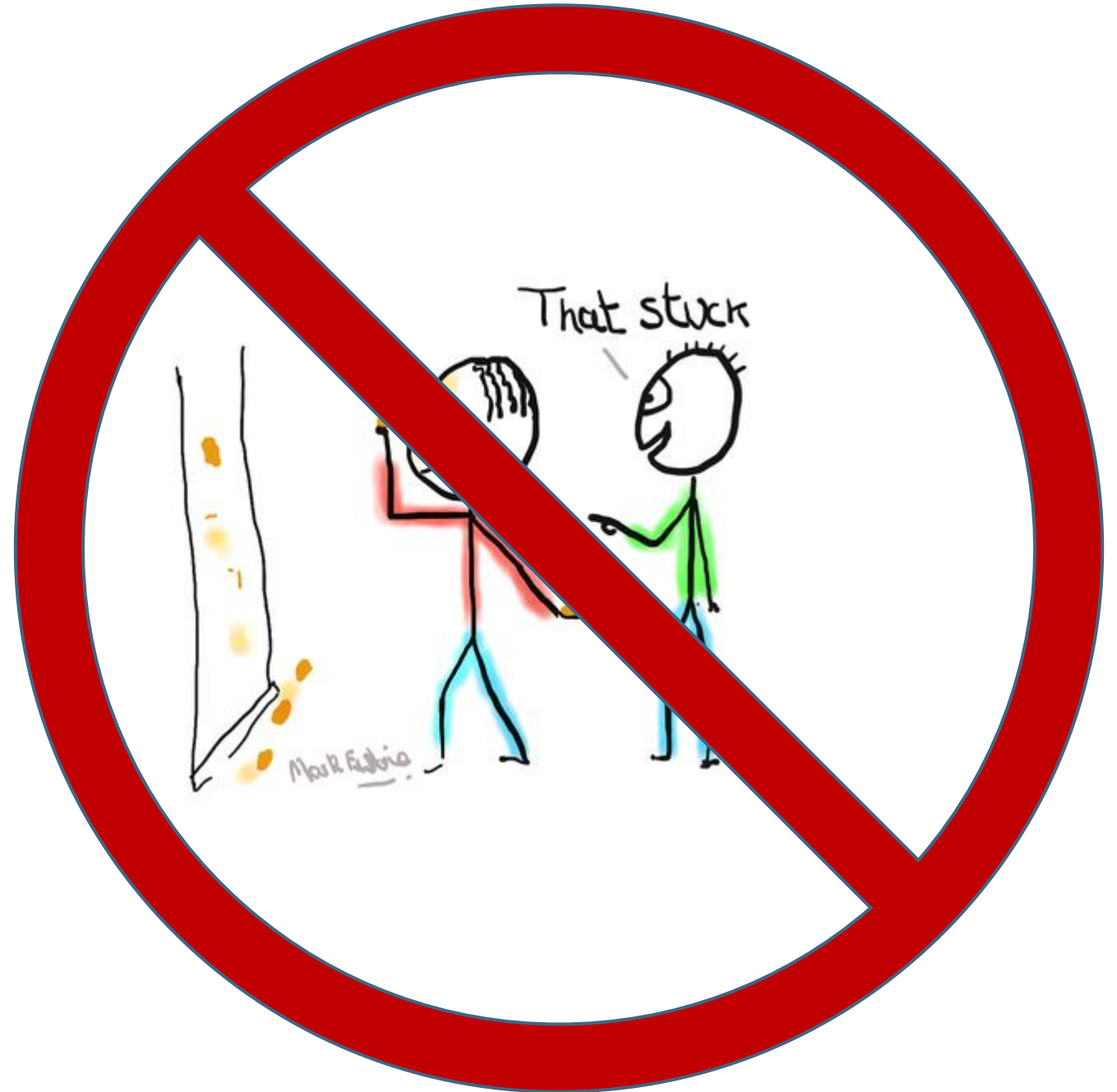Helps us work smarter –> Grow effective change strategies and end those that are not working

Tell a story –> Share experiments & lessons learned

Connect with others –> Engage more stakeholders and experts with data and insights

Not using the spaghetti method

The Improvement Kata. A model for scientific thinking.

Understand the Direction or Challenge

What problem am I trying to solve?

What am I trying to learn about?

Grasp the Current Condition

What do I know?

What do I not know?

What is my threshold of knowledge?

Establish the Next Target Condition

Where am I striving to go next?
What obstacles will I have to overcome to get there?
What will I need to learn?

Experiment against Obstacles
Toward the Target Condition

Act | Plan
Check | Do

TC

CC

The 5 Questions
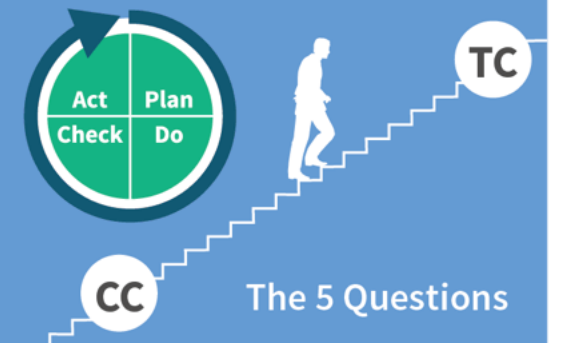
Run experiments against obstacles in order to learn.

Engagement: Family Audiences

Low-income families	Parents who had their first child before age 21	Families with a history of child abuse or neglect
Families with children who have developmental delays or disabilities	Fathers, grandparents, foster parents, other caregivers	Families experiencing homelessness, substance use, migrants/ refugees

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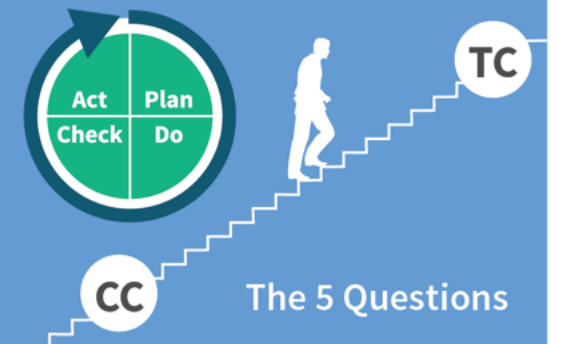
TARGET CONDITION

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Engagement: Partner Audiences

Social Services	Early Intervention	Medical Providers
School Districts	WIC	Public Officials

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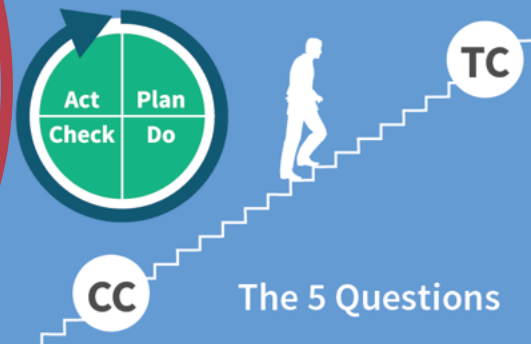**Establish the Next Target Condition**

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What are the blocks or obstacles?

Engagement: Partner Audiences

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We use data: "Go slow to go far"

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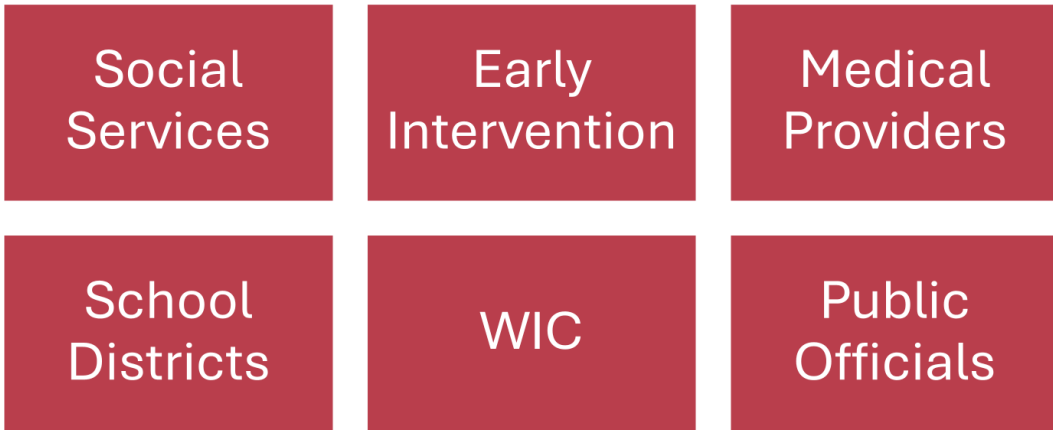What obstacles will I have to overcome to get there?
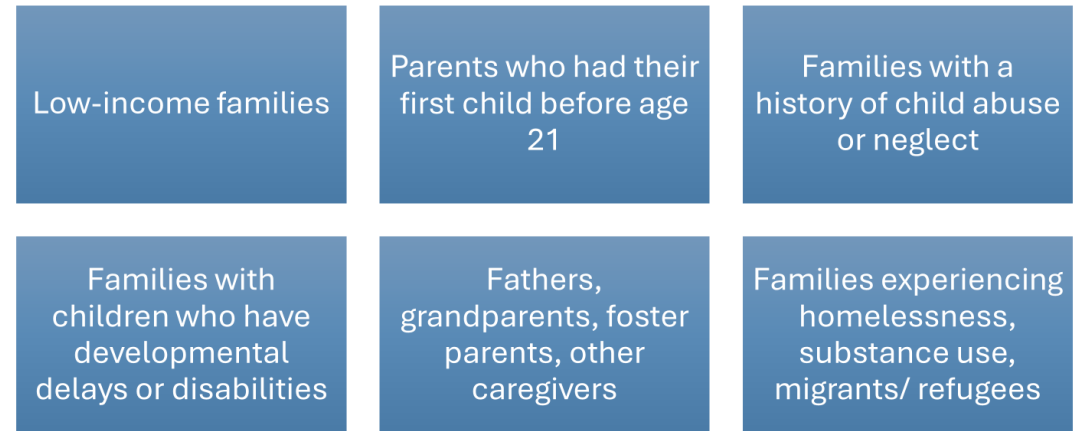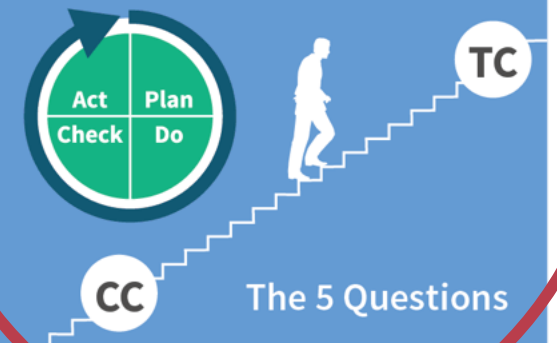What will I need to learn?

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Run experiments against obstacles in order to learn.

1 2 3 4 5 6 7 8 9 10

Rock left to right

5Q card with questions

The Five Questions

COACHING KATA

1. What is the **Target Condition**?
2. What is the **Actual Condition** now?

→ Turn Card Over →

3. What **Obstacles** do you think are preventing you from reaching the target condition? Which *one* are you addressing now?
4. What is your **Next Step**? (Next experiment) What do you expect?
5. How quickly can we go and see what we **Have Learned** from taking that step?

*You'll often work on the same obstacle with several experiments

Reflect on the Last Step Taken

COACHING KATA

Because you don't actually know what the result of a step will be!

1. What did you plan as your **Last Step**?
2. What did you **Expect**?
3. What **Actually Happened**?
4. What did you **Learn**?

→ Return to question 3 →

How does this help?

What we expect to happen ← **Period of learning** → **What actually happened**

Begin again and learn to improve!

PDCA CYCLES RECORD (Each row = one experiment)

Vision: Fastest completion time at the 11s game!

Obstacles:
- Watch notifications interrupt us
- We are not in sync on our counting

Process: Turn off watch notifications

Learner: Leesa

Coach: Leah

Date, step & metric	What do you expect	DO A COACHING CYCLE	CONDUCT THE EXPERIMENT	What happened	What we learned
9/24 Leesa and Leah will turn off watch notifications while playing the 11s game	9/24 Leesa and Leah will not have watch notifications while playing the 11s game resulting a faster score				

THE FOUR PHASES OF ACTION LEARNING, GAMES

Vision

1
Team is the fastest game solver

Target condition

3
Team completes game in :45s

Current Condition

2
Team completes the game in 1m

4
Team tests a small experiment
Team collects data and learn
Team plans next steps

The learning zone

THE FOUR PHASES OF ACTION LEARNING, ENROLLMENT
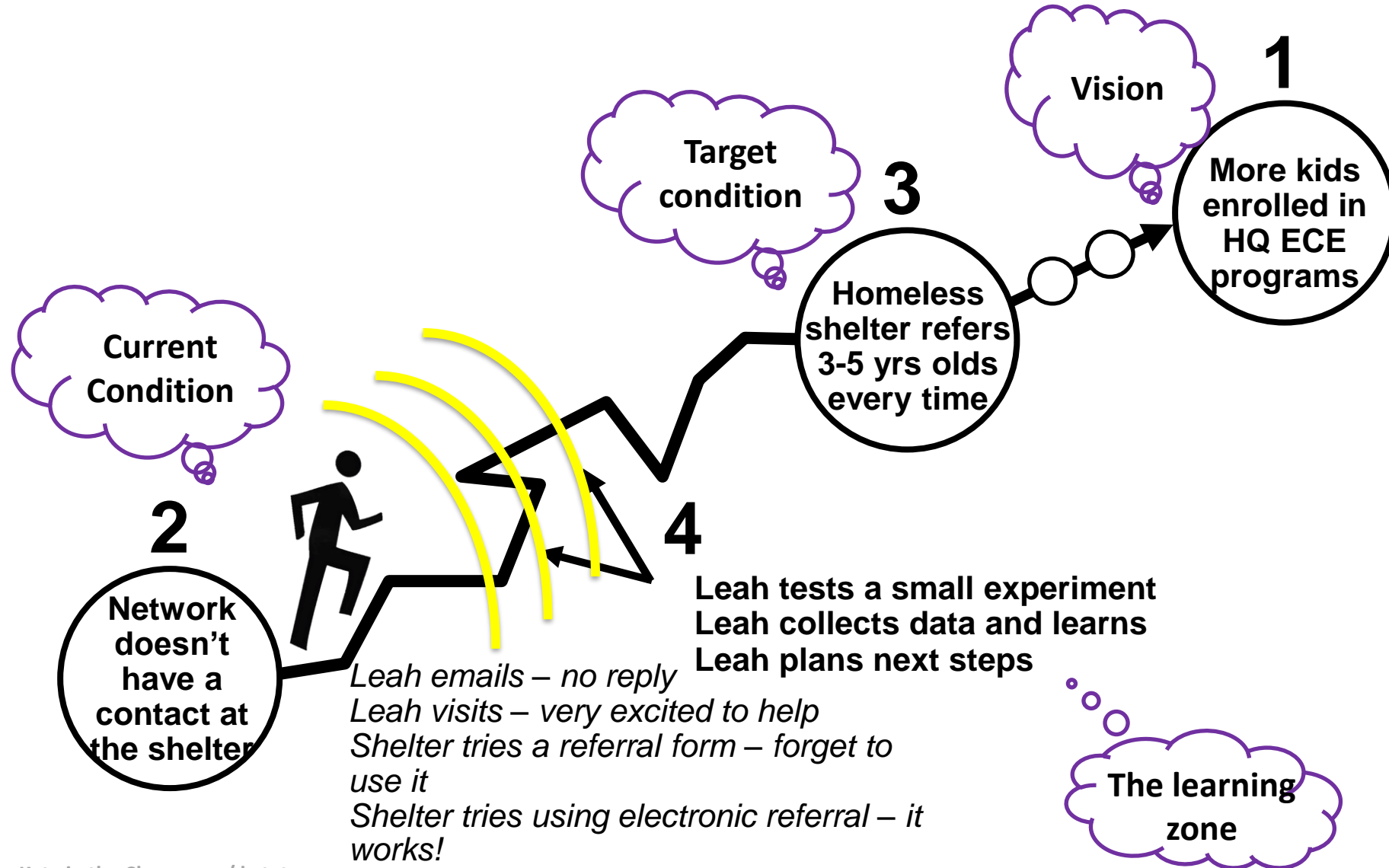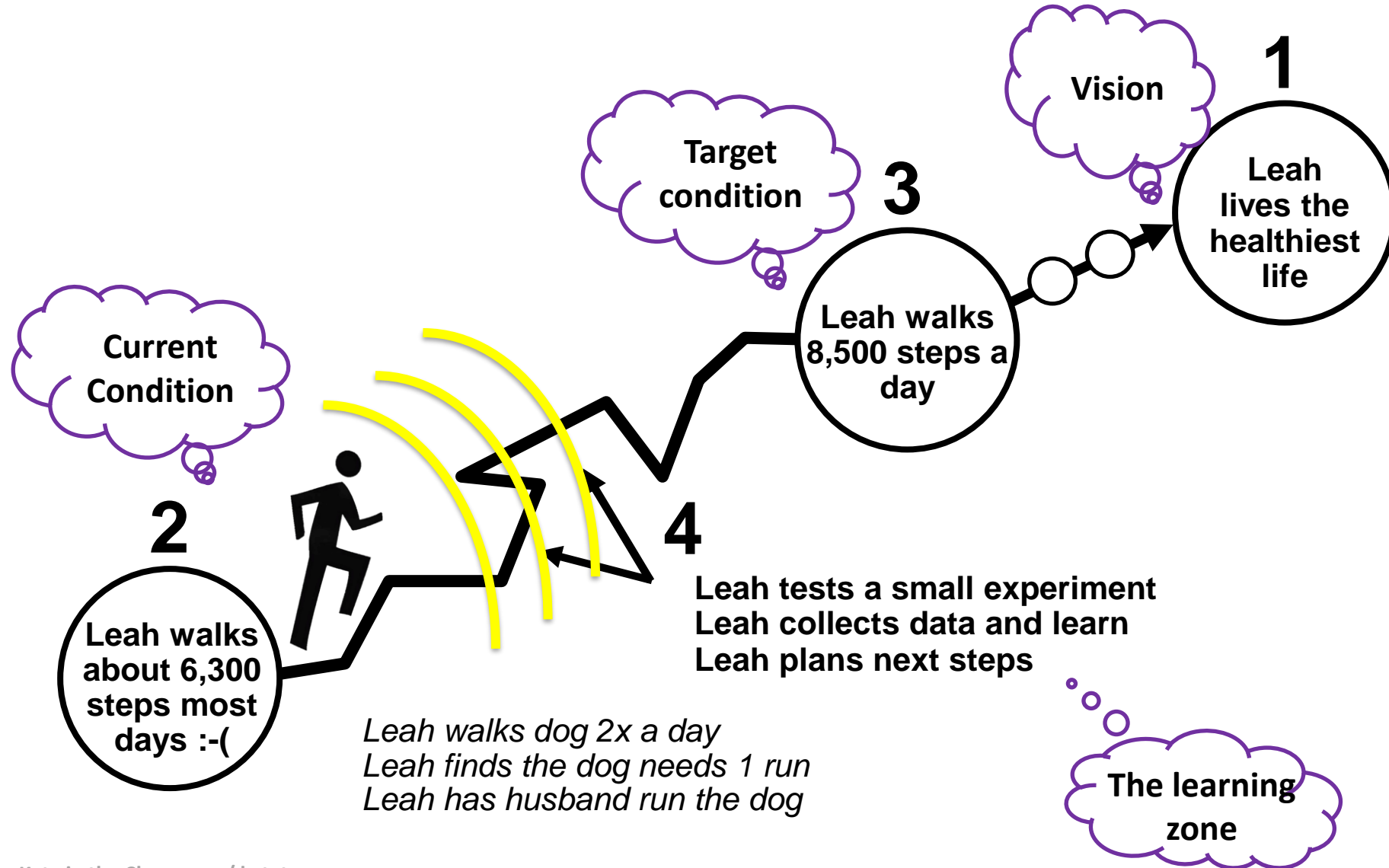
Vision · **1**

More kids enrolled in HQ ECE programs

Target condition · **3**

Homeless shelter refers 3-5 yrs olds every time

Current Condition · **2**

Network doesn't have a contact at the shelter

4

Leah tests a small experiment
Leah collects data and learns
Leah plans next steps

Leah emails – no reply
Leah visits – very excited to help
Shelter tries a referral form – forget to use it
Shelter tries using electronic referral – it works!

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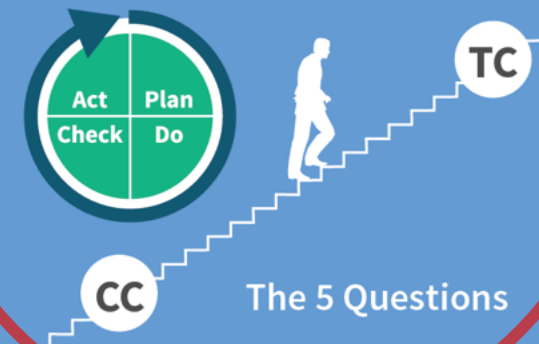Where am I striving to go next?
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How? Build a Habit of Experimenting

1

Pick a ==small== action to ==try== (channel, message, or image)

2

Watch what happens and collect data

3

Given what you observed, what is one thing you will ==try== next?

4

When will you ==try== this next action? What do you think will happen?

We don't fail. We learn.

Think: Where are you applying this practice in your work?

Discuss: What are some obstacles you experienced related to the PRACTICE of CQI / Action Learning?

Stretch break!

Design Habits to Support Your Practice

THIS IS A DAILY PRACTICE. NOT ONCE A YEAR.
GOOD HABIT DESIGN LEADS TO "AUTOMATICITY"
– YOUR WAY OF LIFE!

Introducing: The Fogg Behavioral Model

BJ Fogg, Ph.D.
Stanford University
Director, Persuasive Technology Lab

"For a person to perform a target behavior, he or she must (1) be sufficiently **motivated**, (2) have the **ability** to perform the behavior, and (3) be **prompted** to perform the behavior.
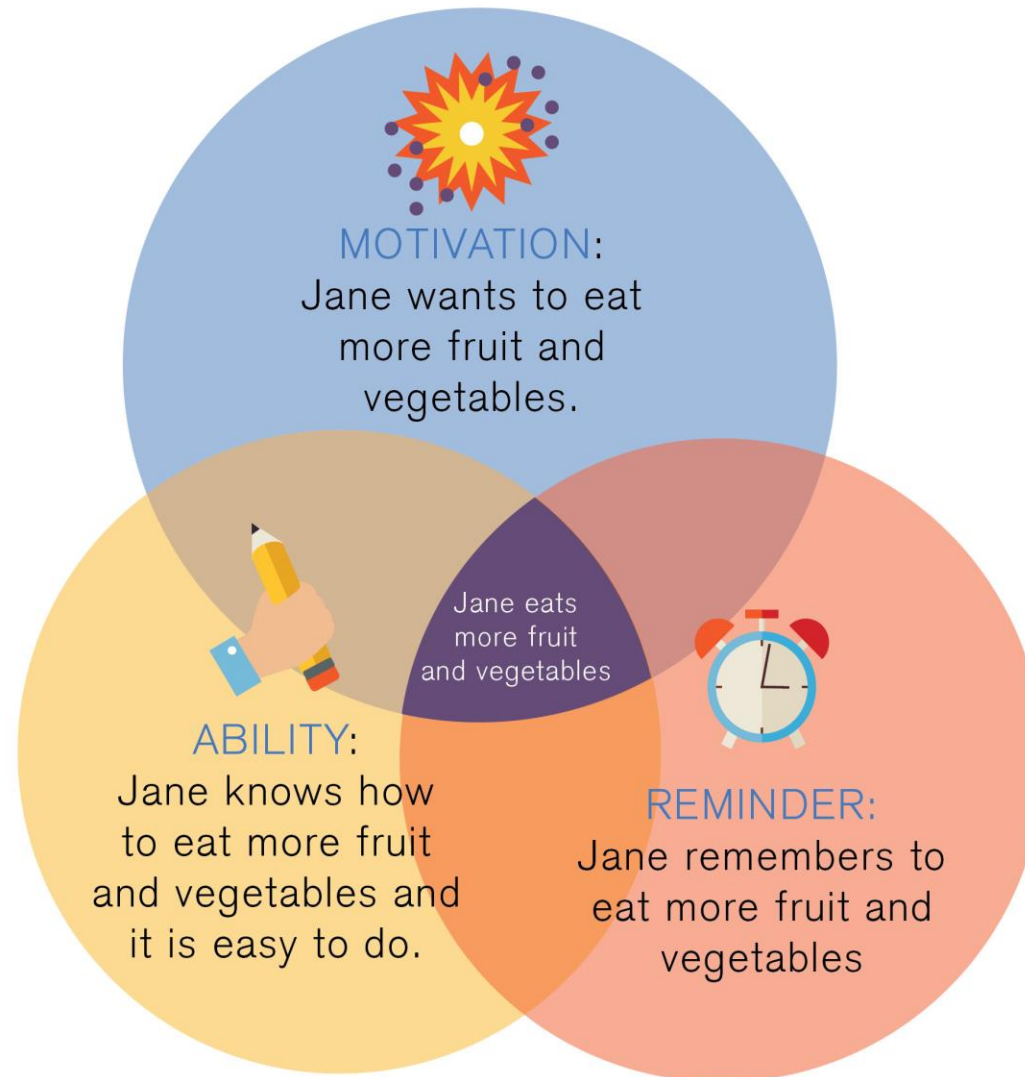
These 3 factors must occur at the same moment, else the behavior will not happen"

Source: BJ Fogg, PhD, created the Tiny Habits method. He directs the Behavior Design Lab at Stanford University. Dr. Fogg's methods have helped thousands achieve lasting change. He authored the *New York Times* bestseller, *Tiny Habits: The Small Changes that Change Everything*.

Example: Jane will eat more fruit and vegetables everyday for three months.

EXAMPLE

MOTIVATION:
Jane wants to eat more fruit and vegetables.

Jane eats more fruit and vegetables

ABILITY:
Jane knows how to eat more fruit and vegetables and it is easy to do.

REMINDER:
Jane remembers to eat more fruit and vegetables

Engagement: Prompt Reminders

- **"When I…, Then I…"**
  - When I open my computer, then I open my parent contact list
  - When I open the contact list, then I make 3 calls
- **Create reminders to prompt your actions**
  - Use Outlook calendar meetings as reminders
  - Ask others to remind you
  - Provide a tool or resource (calendar, sticky notes)
- **Make it part of something predictable**
  - Schedule meetings at the same time, i.e. the 1st or 15th of each month

simple.

ABILITY: KEEP IT EASY

Common obstacles:

What is hard? Make it easier:

1. Does it take <u>time?</u>
2. Does it cost <u>money</u>?
3. Does it require <u>physical effort</u>?
4. Does it take <u>mental effort</u>?
5. Is it part of a regular <u>routine</u>?

The weakest link is what makes things hard
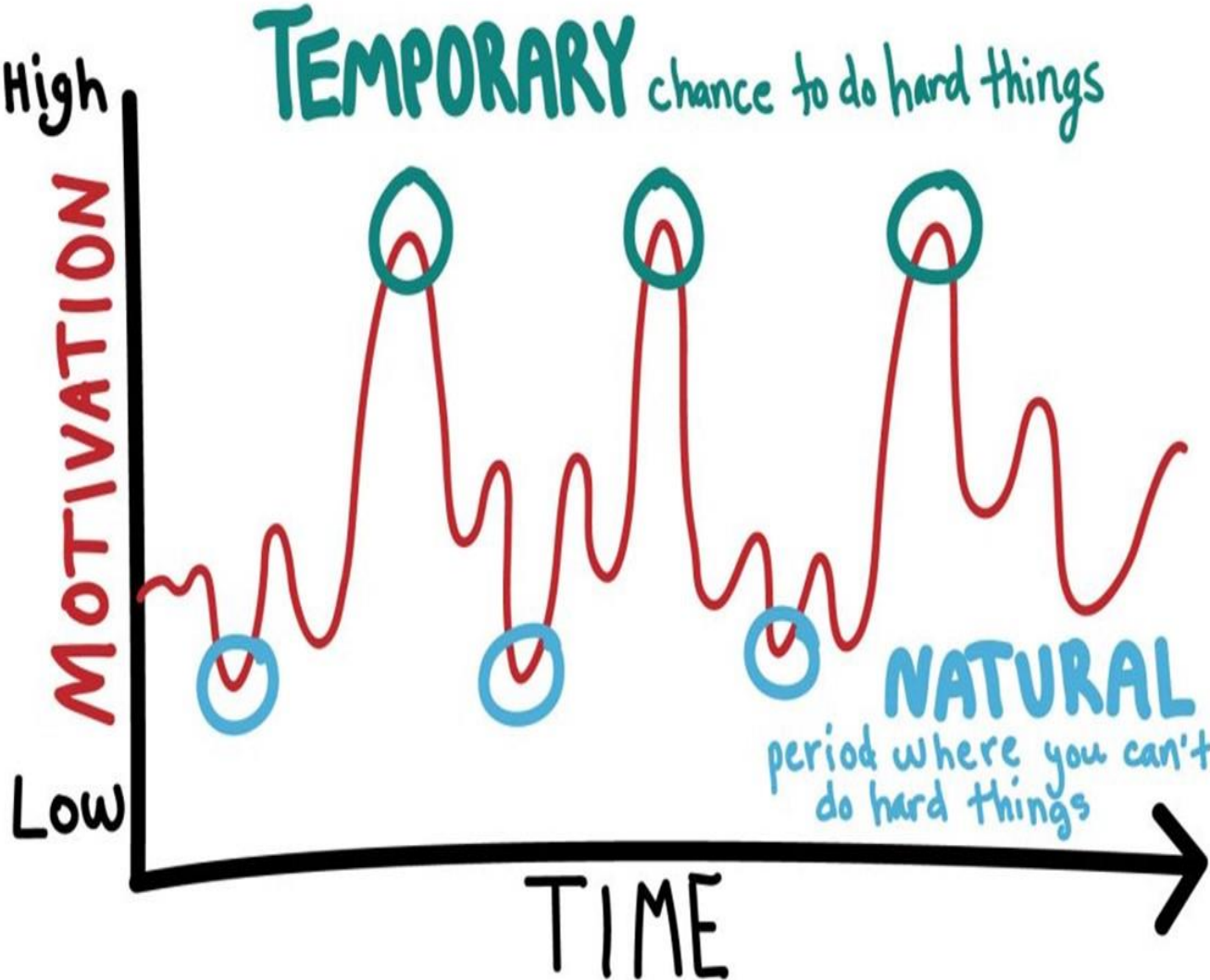
Engagement: Make it Easy

- **Remove barriers that makes things hard**
  - Change the location of the meeting and get closer to them
  - Spend less time in the meeting
  - Make the activity free
  - Lighten up paperwork requirements
- **Create systems to make things easier**
  - Write up a step-by-step action sequence (first do A, then do B)
  - Teach "how-to" and keep it simple (1,2,3)
  - Scale back the expectation, and turn it into a small win
- **Help people do what they already want to do**
  - How? Ask them what's hard and what would make it easier

YOU ARE

AWESOME

Motivation is personal

Motivation is made up of these:

Pleasure ⟷ **Pain**

Hope ⟷ **Fear**

Acceptance ⟷ **Rejection**

Emotions create habits

Engagement: Make it Happy

- **Celebrate in your communications**
  - Yay, you!
  - You took the first step; well-done!
  - We are here to make things easier for you

- **Love your customer**
  - Collect and be responsive to their feedback
  - Be kind in tone and respectful in customer service

- **Increase perception of ease**
  - Go for the easy win first
  - Makes asks that are simple when motivation is low

As practice building your own habits of action learning, pay attention...

Make the behavior clear

Use calendar invites or "when I, then I"

Make the ask smaller. Give guidance in 3 steps.

Spark joy! Celebrate small wins.

Where would you like to use this as a practice in your work?

Share your plan to practice with a neighbor!

Try: Build a Habit of Experimenting

1 Pick a small action to try (channel, message, or image)

2 Watch what happens and collect data

3 Given what you observed, what is one thing you will try next?

4 When will you try this next action? What do you think will happen?

Practice to build a habit …
of ongoing action learning

Practice and practice using the 5 questions in your work

You will build a sense of mastery the more your practice

With mastery comes enthusiasm and an embedded practice

Powerful Habits + Practice =
Effective Action Learning

Small steps... small wins...

Bonus: More Tips for Success!

- **Try it, see what happens**
- Keep it small, low stakes
- **Check-in** after a short period of time (quarterly, one week) to **evaluate what actually happened**
- **The more you practice, the better you get!**

Get Started: Handy Habit Design Tips

1. **Harness motivation where it exists, now**

   Plan complex actions when motivation is high; easy activities when motivation is low; celebrate the wins.

2. **Design structured behaviors to guide people**

   Helping people do what they already want to do; make it simple; create pathways with tiny steps (1, 2, 3).

3. **Take baby steps on your way to lasting change**

   Work in small, action learning cycles; remember that designing "too big" leads to discouragement.

Source: BJ Fogg, PhD, created the Tiny Habits method. He directs the Behavior Design Lab at Stanford University. Dr. Fogg's methods have helped thousands achieve lasting change. He authored the *New York Times* bestseller, *Tiny Habits: The Small Changes that Change Everything*.

Building Habits

"We do a thing with difficulty the first time, but soon do it more and more easily, and finally, with sufficient practice, do it semi-mechanically, or with hardly any consciousness at all...just as a sheet of paper or a coat, once creased or folded, tends to fall forever afterward into the same identical folds." ~ William James