Collaboration through the Eyes of Edison
Guest was Sarah Miller Caldicott

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Transcription of Podcast

Joseph Dager: Welcome everyone. This is Joe Dager, the host of the Business901 podcast. With me today, is Sarah Miller Caldicott. She is a descendent of Thomas Edison and an innovation process expert inspired by her family lineage of inventors dating back five generation; she has been engaged in creativity and innovation throughout her life. Sarah spent the first 15 years of her 25-year career as a Marketing Executive with Global 500 firms including Quaker Oats and the Helene Curtis, subsidiary of Unilever. As a leader of global innovation teams, Sarah was responsible for major brand launches in the US, Europe, and Asia. She co-authored the first book ever written on Edison's innovation process, titled 'Innovate like Edison'. But the book that fascinated me was 'Midnight Lunch: The 4 Phases of Team Collaboration Success' from Thomas Edison's Lab.

Sarah, I would like to welcome you and find it fascinating that a descendent of Thomas Edison would talk about his collaborative strengths – an area most never even think about?

Sarah Caldicott: No, that's true Joe, and it's great to be with you. No, we do think of Edison, kind-of as a guy who worked alone, someone who was up in the lab kind-of closeted away or working at home or his garage but this is really something that comes to us through the myth of the American inventor - we have this sense of inventors working by themselves on the whole. What we really see when we go back to Edison's notebooks and look at all of the documentation in history that we have, is that Edison collaborated from the time he was a teenager - which is when he started working in small laboratories and small workshops in the various cities where he lived. He liked to work with prototypers; he

liked to work with people who enjoyed experimenting just like he did. So we see right from the beginning when he was 18-20 years old - this type of behavior - forming small teams and reaching out into a small community of people to endeavor his ideas and feedback.

Joseph: Well that's interesting, and before we go too far here, you brought up an important distinction in notes that I saw that I think is worth defining. What is the difference between collaboration and teamwork?

Sarah: Well, this is a really important distinction because we kind of bendy around those two words, collaboration and teamwork, as if they were the same. Teamwork is really a process where we contribute our time, contribute our knowledge and offer those insights that we've been asked to give. So we do what is expected or asked of us. It's kind of a laser-in and laser-out effect. When we think about collaboration though, there's more of a continuum. There's more of a learning and discovery process that happens. It isn't so much just a task orientation, and that process continues over time for weeks or months or perhaps even longer. So there's a real distinction as we look at Edison's works when we consider those two things.

Joseph: When Thomas Edison created a team; I think of him being the brains, the smart guy, how did he pick complementary players to be part of that?

Sarah: Edison was of course a genius; he really was the brains of the Menlo Park Lab and

the West Orange Lab which came some 10 years later. I think what we can look to Edison though as today, is a catalyst. He wanted to tap the best of the thinking of all the people who worked for him and was able to draw out their ideas, and draw out their passions and engagement in the way that's different from just being the smartest person in the room. So this is a very important quality I think for us to think about today as leaders, as we are looking to our own organizations or perhaps client groups that we work with. Edison certainly was very brainy, but he wanted to encourage self-development in the people that worked with him and find ways for them to connect to the information and the learning structures that were going on in the laboratory.

Joseph: Well, in the book that's subtitled talks about the 4 phases, now is that something that you just synthesized or were these terms that Edison used and you went ahead and put in the book?

Sarah: That's a great question. Edison actually didn't really codify his process in a way that we might do today. He certainly made all kinds of notes - we have literally hundreds and thousands of pages of documentation in his notebooks, so we can go back and reconstruct what he was doing. But I think what's interesting is just finding the patterns, finding the things that he was doing over and over again and synthesizing those things so that we can apply them today. That's really where 'Midnight Lunch' comes in with the 4 phases. I really sort of put those terms together. I talk about it as 4 phases; it wasn't really something Edison himself noted in any of his work. It's really a pattern that I've kind-of put together just looking back in time.

Joseph: Can you name the 4 phases for people that are just listening to the podcast?

Sarah: Sure. The first phase has to do with capacity. And capacity has an extremely important component of the collaboration process because it's where we establish the foundation for what collaboration is, and also how to engage it - how to actually get people to collaborate. The second phase, I call context. This is a time during which the team comes together and actually creates dialogue and begins to shape their thinking around a challenge or a problem, and asks questions. That's one of the most important things about collaboration. The third phase, I call coherence. This is really where we start to look at how does a team stay together? What are the qualities that keep team members engaged and really giving their best stuff? And the fourth phase, I call complexity. Certainly we're all dealing with tremendous complexity today in an era of smart devices, very fast moving business environments. Complexity was also something quite familiar with Edison. He lived during a time when infrastructure was changing dramatically; in fact 1880 to 1920 is the most prolific era of American innovation to-date. So lots were happening in Edison's time, and he became very adept at organizing for complexity. So this is how we see some of his collaborations being created. So those are the 4 phases.

Joseph: Does the 'Midnight Lunch' pertain to the fact that I've to work long hours and stay up till midnight to eat or what?

Sarah: That's right, burning the midnight oil. A midnight lunch was actually an affectionate slang that Edison's employees gave to after-hour gatherings. Edison would sometimes return to the laboratory around 7 o'clock, after he had dinner with his family and check in on his experiments. So when he came back to the lab, he'd see who else was there, he'd talk with them and he would encourage the 10 or 12 folks who were staying later to exchange notebooks, to actually look at each other's' experiments and talk about what their work was involving, what their challenges were. And they would all share insights for about two hours, do some troubleshooting together. Then Edison would order in food around 9 o'clock - so this was the Midnight-Lunch part, if you will. He ordered in sandwiches and beverages from a local tavern; everyone would sit back, eat and sing songs and tell stories. So for about an hour, they really just had some social time when they got to know each other as people. And then after a while, they go back to work for 2 hours or so and head back home in the wee hours of the morning.

So these midnight lunches were a unique combination of work time and social time. They didn't have any particular agenda; there wasn't someone saying, "Okay, now we have to shift on to this next topic." There really was just open and free-flowing dialogue. But the key thing about these Midnight-Lunches was that they really transformed employees into colleagues. People really began to feel a sense of trust, like an invisible bond, if you will, to the people that they worked with - even if they had different areas of expertise. So this is one of the most powerful things I think we can draw from Edison's collaboration process, is the sense of engagement and connection. This is really part of the first phase that I mentioned, the capacity phase. It's a way to learn how to roll up your sleeves and engage with other people.

Joseph: And I think that's so important to note because true teams are ones that want to spend time together.

Sarah: Yes and that's really that collegiality part. This is something I see missing in many organizations today and some of that is because we don't have the sense of discovery learning or the engagement around certain challenges and problems. We do tend to look at things more as tasks. And when we have that task orientation, we don't get the connections to sync up. So this is a very important distinction, once again, between collaboration and teamwork.

Joseph: And I think it's interesting to say that. But give me some tips on how do we do this virtually - we work across time-zones, we have teams across time-zones. Do these things that just apply to internal or one particular location?

Sarah: Certainly it's easier to create collegiality and that sense of bonded-ness and connection when you're working live with people. Virtual teams, however, are becoming more and more a reality for organizations, just to save time and resources. And of course with globalization, this is a fact of life for many companies that have manufacturing operations in China or Mexico or other parts of the world. If they have a U.S base of operations, then those folks need to be connecting with these people with other time-zones and so on. So part of the magic of a virtual team is to enable the members of that team to connect behind the scenes in multiple ways. This is the part that's missing when you can't

be together - that kind of water-cooler conversation, the ability to randomly come together and have a discussion. So part of what organizations can do is to set up little mini-forums that happen online, and they can happen at any point - whether it's real-time or in a discontinuous way over the course of the day or the week. I like to actually do trivia contests with virtual teams - have people actually relate a set of trivia or facts to the challenge that they're working on, as well as just different facets of their own culture, different areas of knowledge that people can weigh in on and try to guess or try to connect with. You start to learn interesting tidbits about people that don't come forward when you're actually involved in your business engagements, in your Skype sessions, in your teleconferences and so on. So giving people a forum to actually create a connection in a virtual way is very powerful.

Another way that people can work effectively and collaborate is to team up offline - actually just have a conversation. A two-way conversation, three-way dialogue in a team of say, 8 to 10, that happens at a separate time when you're really just going to talk about your own personal interests, some of the passions that you have in life that might not be related to the work structure itself. Some of these types of activities help give people a sense of who the other person is. Who are some of these folks that they can't always physically connect with?

Joseph: I think that's great advice and with companies sitting there looking at going out and try engage in social media, they always forget about that first word - social. And what I always tell them, I said, "You need to be practising that inside your organization before you bring it to customers and try to be social with them!" And I think those were great tips

on how to start engaging within that organization.

Sarah: Very important to do that.

Joseph: Is every project - can we collaborate on every project or how do we know which ones not to collaborate on and which ones to - is there any guidelines there?

Sarah: This is an important thing to consider at the very front-end. One of the things we often to is we have things in our organization that are boiled down to into processes. These are the things that we could actually enumerate in that checklist - you could write them down on a piece of paper and say, "Okay, here are the 10 things that we've got to get done as we move from today to tomorrow, or as we deliver this project to the customer." But these are the things that are codified, they're well-known; they don't really need to be re-examined and re-evaluated every time. So those are the types of projects if you will that really don't require a high level of collaboration. Collaboration really comes in to play when we've got a challenge that's not so easily boiled down into discrete components - when you're developing something new, when you're trying to address something that may have been lingering within the organization for some time. Something that may have multiple layers and isn't just sort of a straightforward process to analyze. So collaboration really requires discovery learning - this is part of what I've mentioned earlier - people are going to be learning things together that they didn't know as they first set out in their team endeavor. So that's part of what distinguishes collaboration from teamwork - you can't just sit and list all the to-do's and all the items on the checklist that has to be

identified.

Joseph: One of the buzzwords right now is innovation and everybody - and I don't know that we can go talk to a company that won't consider themselves innovative or agile. One of the major parts of innovation is collaboration and did Edison see it the same way?

Sarah: He really did. In the first book 'Innovate like Edison', I talk about what I call the five competencies of innovation. And collaboration or mastermind collaboration, which is specifically how I describe it in the book, is the fourth of the competencies. So 'Midnight Lunch' really delves into more detail on what does collaboration embrace. I think that collaboration was really the on-ramp to innovation for Edison. I think it was really that big leverage point that allowed him to be so successful with so many different areas of endeavor. I mean, here's a man who created breakthrough innovations in sound, motion, in electricity, in stored electrical power in a battery, document duplication - these are capabilities that are quite different from each other. So without collaboration, he wasn't going to be able to create a learning environment where people would take on new capabilities and be able to shift and adjust and move into a new way of thinking. So I think collaboration was really one of the most fundamental aspects of Edison's innovation success.

Joseph: Is Steve Jobs the Thomas Edison of his day? Or what's some of the similarities and what's some of the differences?

Sarah: Well, it's a great question, and I get asked this question frequently as you might imagine. I think Steve Jobs had many of the qualities that Thomas Edison displayed. There are certainly similarities and differences. Among the similarities is the notion of being a catalyst - somebody who could get other people to contribute their best ideas to really work beyond the limits of what they thought they were capable of, in terms of their contribution and in terms of the ways that they could contribute to the team. Catalysts are so crucial to our work environments now, and Steve Jobs really was that. Another way that Edison and Jobs are similar was their willingness to tackle big new areas that no one had undertaken before - looking for that white space, as we might call it today. Places where or people had not been creating new ideas or breakthroughs. Certainly Jobs did this with iTunes; he did this with the iPod and the iPhone. We could go back into the Mac and look at how he brought his ideas together for the Mac. Really, foundationally different ways of thinking that transformed how people used products and services. And in these endeavors, he created platforms - this is also a similarity to Edison. If we look at the phonograph or the record, if we look at the movies, if we look at document duplication, these are platform concepts that actually accelerated the invention or innovation of other capabilities that went beyond them. So developing new breakthrough platforms is also a commonality that Steve Jobs and Thomas Edison shared.

If we look at differences, I think there are some important ones here. Part of Edison's focus was to teach his employees, to actually transmit learning to them and to help them self-develop. Edison had a huge library at the West Menlo Lab; it was, in fact, the fifth largest library in the world at that time. He encouraged people to move from one function to another in his companies, so these were all ways that Edison sought to be an educator, if

you will, and improve people's learning capabilities. We don't see this so much with Jobs. I think he certainly had tremendous resources within his companies, but I don't think he viewed himself as a mentor to others internally. And the second difference that I would offer is that Edison really enjoyed working with providers to help them align with his own way of thinking, to help them improve their capabilities and their processes so they could do things - like help them manufacture the light bulb or produce motion pictures. Jobs certainly challenged his partnership network. He had people changing their processes and doing things that went well beyond what they thought their capabilities were. We can look at Gorilla glass, for example, at Corning, as one example of that - it's been written up many times. But Jobs wasn't the one who was working with them, he didn't actually deploy people there to actually help them do that. So I think that's part of the differences that we can see too.

Joseph: What is so crucial that we understand collaboration nowadays? Is that a game changer for organizations?

Sarah: Well, this really gets to some of the 4 phases and what distinguishes collaboration from other part of what we do. A big beginning point is the diversity of the team itself; being able to bring diverse viewpoints, diverse areas of understanding, diverse expertise on to a small team. Edison really valued nimbleness, and certainly today we call this agility - the ability to move rapidly, to think rapidly, and to create processes that could move quickly. Collaboration was that for Edison and part of how he organized his teams was to get different types of people together. He wouldn't put all engineers, for example, on the

same team, or all physicists, or all mathematicians - he liked to mix up the disciplines so that they could bring the best of the thinking that they've had from their own training into the bigger pot, if you will. People could actually learn and troubleshoot faster this way. This is something that management science actually proves out today. As we look back, we could see Edison was really doing this type of thing, back in the 1870s, 80s and beyond. So collaboration definitely was a game changer for him and can be a game changer for us today.

Joseph: Tell me about what Power Patterns of innovation does?

Sarah: Well, what Power Patterns does is works with executive leadership, as well as individual teams to help them maximize the impact of their innovation processes. A lot of my work looks at what is the effectiveness of innovation in an organization right now? How can that effectiveness be improved? And part of what distinguishes some of my work from what others do is to look at some of those internal - call them organic processes - what are some of the raw capabilities that the company has? Its sweet-spots if you will. Every organization needs to build its innovation capability around these sweet-spots and then add more. In some cases, even connecting these sweet-spots together, part of what I do is to really help teams work more effectively, help teams to develop collective intelligence so that other parts of what the organization may know but aren't in their immediate sphere, can become available to them. And also really help drive the speed of what companies do. Some of these come into the collaboration discussion, part of what Edison really did extremely well was to ask questions first, before trying to create solutions - that engages

more alignment and actually more knowledge resources against an issue, right up front. So finding some of those acceleration points for an organization is what Power Patterns does.

Joseph: What problems do you see when a company says, "Oh, we need to become more innovative. Sarah, how can we do that?" and what are some of the misconceptions that they have?

Sarah: Well, employees' key on what leadership does. Employees model their own behavior alongside what they see their leadership team's modeling. So it's very important for organizations when they say, "We want to become more innovative." but the leadership actually recognizes that that's going to mean changes in their own behavior, changes in their own mindset. You mentioned earlier about social networking. Well, before you bring social networks out to your clients, you want to be able to understand them and have some grasp on them internally. It's the same with leadership behaviors and how innovation is modeled. You want people to be keying on the same types of organizational structures and engagement capabilities internally and within leadership that you're asking your teams to undertake. So I think that's one of the biggest misconceptions is that a leadership body can say, "Okay, we're going to be more innovative." and they don't necessarily recognize what shifts that may require within their own sphere.

Joseph: One of the things that - I have to ask you one last question because as you talk, I just keep thinking about it. But we talk about co-creation, co-innovation and these

different peripherals being applied in conjunction with customers and suppliers today, does 'Midnight Lunch' apply to that spectrum?

Sarah: It absolutely does. And in fact this is a big part of phase 3, the coherence phase - where often a team's capabilities require that they connect with an outside body. Their charge, their mandate, the thing that they've been asked to solve requires that they bring in additional resources, and this is where a partnership network comes into play, a provider network, a group of suppliers. It really looks at how we want that communication to flow. A lot of our organizations have been structured so that internal communication flows well. But when we think about collaboration, we also have to look at how does the outside-in - and even the inside-out communication flow. We can look at examples like Proctor & Gamble, where they brought forward connect and develop - working with an open innovation platform where P&G connected its own knowledge resources out into a whole array of partnership structures and inventor networks, where they can be tapping new thinking. That requires the capabilities that I talk about in that phase 3 coherence areas, where you want to be structuring your team in a way that allows for speedy communication and synthesis of data. Synthesis of data is probably one of the most important capabilities that we will all require, going forward. We think about Big Data, the capability we have now to store data, track it, detect patterns - these are some of the new capabilities that organizations need as they look outward for their partnership activities and seeking to collaborate effectively.

Joseph: Well, I would like to thank you very much, Sarah. Wonderful podcast you gave and great information you gave. What's the best way for someone to contact you and learn more about what you do?

Sarah: I would invite all of your listeners to come to my website which is www.powerpatterns.com; I have a list of the articles that I've written. There's more information on my books there; there're also some free worksheets for 'Midnight Lunch' which readers can use as they walk themselves through the book. It breaks it down into twelve different segments, so it's a great resource for teams to use as they're seeking to improve collaboration capabilities. And there're a number of videos and other podcasts also on the website. So that's one place that folks can go. People are also welcome to reach out via email and ask a question if they'd like via email, at scaldicott@powerpatterns.com, and that email is also available through the website.

Joseph: Well, thank you very much Sarah. I look forward to taking a deeper dive into your work and reading your other book because I enjoyed 'Midnight Lunch' so much that I can't imagine that I'd be disappointed with reading a couple of the others.

Sarah: I'd love to have you check it out, Joe, and thank you so much. I appreciate all of the conversation today.

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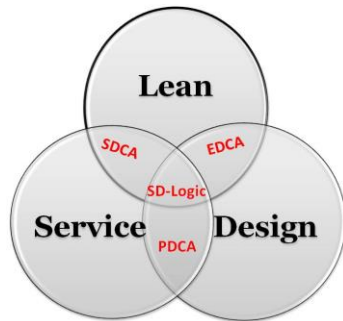
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