

Business901 Podcast Transcription

Implementing Lean Marketing Systems

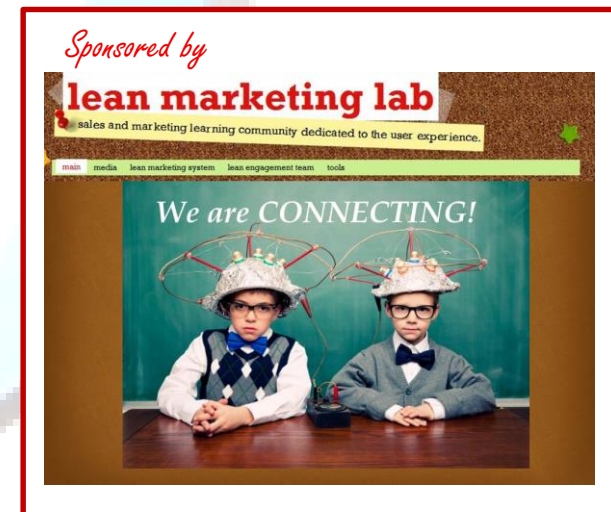


The Virtual Individual

Guest was Dana Sednek Bowler

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Transcription of the Podcast

Joe Dager: *Welcome, everyone. This is Joe Dager, the host of the Business901 podcast. With me today is Dana Sednek Bowler. She is a professional facilitator, speaker and workshop leader. Dana helps organizations design interactive and engaging processes that help online and remote teams make better, more innovative decisions together. Her life's work is focused on collaboration performance improvement that ignites action, reveals insights and helps teams align with their customers faster. Dana, could you complete that introduction and update me with what you're doing now?*

Dana Sednek Bowler: Oh, absolutely, Joe. Thank you so much for having me here. You know, I am working as the manager of live online at a company called 'Interaction Associates', and we're working on developing next generation live online learning programs that scale. So, how do you develop conversations and connections – learning about leadership and working in this virtual world with large groups at over a hundred and twenty-five folks at a time – how do you create that collaborative conversation that drives organizations forward in their culture and in their competence. So, that's what I'm working on today.

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Podcast Transcription

Implementing Lean Marketing Systems



Joe: *With such a bubbling personality, and a great presenter and everything – I wonder why you end up facilitating online collaboration that's all structured for..., I don't want to say geeks or anything – but the introverts that live on the computer.*

Dana: Right, right. You know, it's really interesting. I've gone in live online and online collaboration stuff – I've been doing it for almost ten years now. I have run across both introverts and extroverts, as well as folks who are on the geeky side, who love to play with technology, and the other people who are kind of averse to that technology stuff, but are required to do some of this just because it's the way that they work and have to get things done. You know, it's really interesting because the thing that I love about being able to work remotely and online is that I get to connect with and work with all kinds of different people from across the globe. My need as an extrovert gets fulfilled because I get to connect with people who are totally unlike me, yet we still share the similarity of, like, "Oh, we need to get this work done," – and can share diverse perspectives together in a way that didn't used to happen before there was the ability to skype, or video call, or share my screen with someone else and be able to make that connection without having to be face-to-face in a conference room together.

Joe Dager: *Well, I just about think you have to have more personality when you're online to get that message across without it dragging along.*

Dana Sednek Bowler: Yeah. You know, it is interesting. There's a little bit of that need for, what they call, on-air personality, or some type of leadership capabilities that help you to drive conversations when there are multiple people, kind of, doing work together, right?

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I think maybe it's more about leadership skills, or process skills associated with how to keep people engaged and moving forward, not just the, you know, bubbly personality or extroversion that's associated with it. It really is all about – how do you get people to share collective visions for something, how do you get them to feel comfortable with being able to share their insights, and their input into the greater conversation. I think introverts and extroverts are equally right, apt and able to do those types of things. It just takes a certain skill that you've got to develop. You know, some people are really good at doing that face-to-face, and they're introverts, right, and others can become really good at doing it virtually as well.

Joe: *What makes a good facilitator? What makes a good online personality? Maybe we'll get away from the facilitator, but what makes, you know – can I have a team of numerous, good online personalities?*

Dana: Oh, absolutely. I think that good online personalities come in, I think, a lot of front-end process things that you set up with the team, right? So, if you think about a group that has to get together in order to accomplish something, right? Isn't that the kind of definition of collaboration – we need each other in order to get something done. How do we all come together and make sure that our voices are heard – whether or not we're quiet or loud or what have you. When we think about good facilitation, or good on-air personality, I think the biggest thing is to have a focus on process – to really be able to focus and have the ability to define the way that you want other personalities in your collaborative process, or in your group to help define and direct how you want them to interact with you and with the group. So, if you can focus on all of those key skills of helping – I like to call it, kind of

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like being the person who talks through games, like a sports anchor, or sports – what do they call those, Joe? The people who, you know...

Joe: *Not the play-by-play person for the game. You know, they analyze things.*

Dana: Yes! The analysts, and they're the ones who give the play, of like – what is happening, or what should be happening now, or what's going to happen, or why did it happen and all of those things. A really good online facilitator, on-air personality, focuses their direction on giving that play-by-play and setting up the players for the play, right? To say, like, "OK, we're going to talk about this, and here's how I want you to talk about it. Please use the tools like chat to tell me one thing about this topic that is really important to you." Helping people kind of create that container of how it is that they're supposed to participate together, really allows for, kind of, collective conversation in all groups, and group member to really be heard. It helps with some of the stumbling over each other that tends to happen when we're on these crazy, online conference calls, for example, where you can only use your voice to be able to interact with one another, which can be really frustrating.

Joe: *You have to have some different skills to be a good facilitator. Just because you're good offline, certainly doesn't mean you're going to be a good online facilitator, right?*

Dana: Totally, totally. You know, it's interesting – some of the same skills in terms of being a good or effective group leader, or group facilitator, it's very much the same type of skills at the foundation when you're online vs when you're offline, right? Like, your job as a facilitator – when you've got a group around the table with you, face-to-face – is to

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objectively make sure that everybody's voice is heard, that we're getting all of the best ideas on the table, and that we're capturing, kind of, real-time what is happening in the meeting. Then, at the end, of course, we're capturing all of the identified actions, who's doing what, by when, and with who. All of those kinds of process details. Those skills can absolutely be learned, and I think those skills can be delegated. I think a lot of leaders forget that you don't have to do everything all at once. So, if you're in a an online virtual meeting and you're the leader, you've called this meeting in order to do something, don't forget that you can delegate someone else to take notes, and you can delegate someone else to identify the actions somewhere and, you know what – you can actually delegate the whole process of being the lead facilitator to facilitate the conversation to somebody else on your team. That helps so much with building inclusion and building trust – and, also, making sure that you're not, kind of, using your leadership skills to drive to a result that you want, but allowing for the group to emerge with the direction that needs to happen, based on whatever you're trying to achieve.

Joe: *So, your agenda really needs to – you really want to reach out past participation. You want to pull them into some type of action or activity within the meeting.*

Dana: Oh my gosh, totally. You know, it's really interesting – I was featured in a magazine article on Entrepreneur magazine. If you want to look it up, it is called, 'For more productive meetings, throw out your conference table.' I talk a lot about what happens in virtual meetings where there often is not enough two-way types of communication. For ninety percent of the time whoever is speaking is speaking, and then maybe you get ten percent of your time to answer any questions or anything, and it becomes this old-school, death by

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PowerPoint – we've been bombarded by somebody's thoughts and insights, instead of collective participation. So, I have a structure that I like to call the '3-12-20' rule. When you're scheduling an online meeting, and say it's 30 minutes long, right, you've only got three minutes to make preliminary remarks. The rest of the meeting should be dedicated to letting others talk, and include their input, right? If it's a 60 minute meeting, which is normally the structure for meetings, guess what – you've only got twelve minutes. So, that's it. All of the rest of the time should absolutely be dedicated to getting and capturing the input of everybody else on the call.

Joe: *If you could give one piece of advice to the team leader of a virtual team, would it be "quiet" – I was going to say another word there.*

Dana: I think so. I think one of it is to be quiet, but I also think that in order to get better expertise and build better online leaders, one of the best ways to do that, as a leader of a virtual team, is to delegate that opportunity to your team to help them rise to the occasion and learn by doing. One of the biggest pieces of advice that I give virtual leaders is – you know, they normally have some kind of team meeting – maybe it's a weekly meeting, maybe it's a daily stand-up – and I often find that they're the ones who are running it. The first suggestion that I say to them is, "Look, why aren't you delegating that or rotating that opportunity so that you can get away from feeling like you have to be the one talking all the time." Like, turn it over to somebody else. That way you can get out of your own way.

Joe: *What do you think makes online collaboration difficult, or isn't it? Should it be second nature to us, but I don't think that it is. I think people struggle there a little bit. Why is that?*

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Dana: Joe, that's a really great question. I actually think our own human nature is what tends to make us challenged in the face of online collaboration because we try to apply the same principles of how you do it face-to-face in an online environment. So we try so hard to be like, "Whoa, this is what I would do if everybody was in a conference room together, so let's replicate that when we do it online." We forget that there's all of these really great tools and techniques that you can use in an online environment that you don't actually have available to you in the face-to-face world, so you miss out on that opportunity to be able to have a collective conversation with 125 people, all at the same time. That's available and doable in an online space, but you can never get that done in a face-to-face space unless you've got four hours to kill, right? I think that's the challenge, because we don't know what we don't know, and we forget that there's all of these other tools out there that can help, kind of, leverage this next generation way of working with one another.

Joe: *Could you give me a couple of examples of those tools?*

Dana: One that I just mentioned is all about the chat. Being able to frame a question that everybody can answer and respond to. I love to use focused question on top of a chat to get everybody's answers or responses coming. Then I like to use a third tool at the same time, like a virtual whiteboard where I can collect or start to throw up onto the virtual whiteboard wall some of the themes that I am seeing throughout the chat that's coming in. So, all of a sudden, I've gotten everybody's voice heard. Everybody has the ability to type in something, and then I'm able to pack up all of the comments or insights into some key themes that I hear in a meeting, for example. Then I look at the whiteboard and I see – OK,

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so it looks like we've got three or four themes that are running throughout this conversation. Once we do that, then we can use another tool like, either a poll or a pointer tool to say – OK, now let's prioritize. Now that we've got these three themes that are important to us, or these five themes that are important to us; now let's vote. Which one do you feel is the most important or relevant to the work we're doing today. So, then you crowdsource this ability to prioritize the focus for the meeting, and you're getting feedback on where the energy in the room is, or where the energy of the content is located – and that's really helpful. So, it is to say that there's a whole lot of tools out there, but it's more important to know how to use the tools to get at what it is that you want to achieve with your meetings.

Joe: *Let me take the person who works offline, or online, all the time. Let's say, out of their home, or they're always virtual. What are some of the challenges they have? We need that human contact – can that be done just virtually or not?*

Dana: Definitely some challenges that folks who work from home can face in terms of that human connection and feeling like they're connected to the workplace. Especially if they're one of the lone few who are working remotely and everybody else is in the office, right? They're going to miss that opportunity to have some of that time to be able to get to know their colleagues and their coworkers beyond just the work that they're doing – get to know them on the human level. Like, the stuff that they like to do outside of work, or build friendships and relationships in that type of working situation. However, I don't think that it can't be done.

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I actually have a lot of my colleagues and great collaborators whom I have never met face-to-face, and yet have built such a deep relationship with them because we have spent time virtually getting to know one another, beyond just the work product. We take the time out to say, "Hey, how was your weekend? What did you do?" You know – what are the things that you like to do that really recharge your batteries when you're outside of work. What are some of those things – and be able to take that time in the front-end of meetings to check in with each other beyond just the content or the results that we're trying to achieve. If you have too much focus on results, you're not attending to your personal relationships, or the relationships that actually help build and foster trust. That's a critical component there. I think the other challenge that I've found myself – if I spend more than three weeks at my home office, not really interacting with anybody face-to-face, I seriously feel like I have atrophied skills with, like, networking and seeing people face-to-face. So I go out – if I've spent too long in my home office, then I go out to a networking thing or I go out to meet some people that happen to be work-related. I forget – what kind of questions should I be asking to get to know one another, like, I just forget about it, right? So, my skills atrophy, and I feel more awkward when I'm in a face-to-face environment. In order to combat that, I feel like, for me, it's every two and half weeks is where I pretty much hit my mark where I actually need to have a human, face-to-face, contact in order to keep my skills sharp.

Joe: *So, you really should plan some type of business activity, or – can I go out with my bowling team and bowl, OK? I mean, would that be good enough?*

Dana: You know that's interesting. I think that making sure that find time for both of those things when you're working remotely is really critical and important. When I used to

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work for a company whose headquarters was on both coasts, and I was here in Denver – we actually had an office here in Denver, but I didn't know anybody. Finding that collegial connection with others helps you become a continuous learner in your job and in your profession. So, I really do suggest taking time out for the types of things that you like – like going to bowling with your league, or, like I like to do, riding my road bike. That's really critical because that gets you outside of the box of the stuff that you're working on at work – but, similarly, it's so important to be able to make connections in your network so that you can have conversations about stuff that you're working on in general and get some kind of other expertise, or other expert insight into the work you're doing so that you can maybe get a fresh perspective. At the same time, building these relationships for your network that are close to home, because you never know what happens in these days – one day you could find yourself working from home, and the next day you could find yourself not at that job anymore. What are the connections or networks that you fostered that can help you get your next job, or your next gig, or your next project.

Joe: *Well, that brings me back to this word that is very difficult – I think, to manage and to get online – is trust. I think that's a huge thing and I've related to my son's online gaming, because they will trust each other as teammates, and to go in and they built that trust and that connection because even when the team fails, let's say, they still, twenty seconds later, have to trust each other to repeat the process.*

Dana: Yeah.

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Joe: *There's a huge trust factor in those games, but the teams never seem to be cemented until they go to some LAN events where they play together, and they interact physically. I have to think that's very similar to most virtual business teams – to develop that trust factor. How do you do that?*

Dana: Absolutely. Yeah, you know, you make a great point. Building camaraderie and trust in the gaming world and in the virtual world is critical. You have to rely on somebody else to get things done in order to win at whatever it is that you're trying to achieve. Interaction Associates did – they do an annual trust survey. This year, they actually looked at remote workers, and asked them, "What are the key, big things that – the critical parts of working remotely – help you build trust?" 40% of that work virtually who completed the trust survey said that the number one thing was periodic 'face-to-face' time with their teams and with their leaders. It totally aligns to some of the performance success measures that folks have done, and studies out there where they compare solely, totally virtual team who has to complete something in a given deadline, and then they pick a team who gets together face-to-face at the beginning of that and has to complete the same thing – you know, which one has higher productivity or higher performance gains. Time and time again, in all of the research that was done, typically the folks who are able to come meet each other face-to-face at the beginning, or the kick-off, of an initiative, can work faster and achieve trust at a much faster rate because they've met each other face-to-face. Like – I know what they look like. I know how their voice tonations match with their non-verbal language. I can start to imagine, while we're working remotely, what this person is looking like while they're talking to me. So, I've learned about what their life is like outside of work so that I see them as a whole human being who is part of my team vs this guy over in India who has to deliver this

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document to me by a certain time or date. I see them as a more complete part of the human experience of collaboration.

Joe: *That trust – you agree that it's very difficult to obtain just online?*

Dana: It is. It doesn't mean it can't be done. It just take longer. One of the things that I recommend to teams – because, not all the teams have the budget to be able to say, "Hey, look. We're all going to meet in California and have a three-day offsite together, face-to-face. What is it that you can do to start building those incremental steps towards more and more trust on your team? What I like to recommend is – building those opportunities to connect with one another like virtual water-coolers. When you think about being in the office, the way that we get to know each other is when we're walking to the printer, or walking to grab the second cup of Joe for the day. We run into somebody and talk about our weekend, or talk about something funny that has happened. I often make recommendations that you can build that type of informal learning and informal 'getting-to-know-you' into the virtual work practice. Some people have, like, an open chatroom, where it's just like a hangout room, and if you want to post something about how your weekend was or what have you – you can go in there periodically to take a virtual break and bump into your colleagues and talk about the latest sports game, or TV show, or whatever it is that is of interest right outside of regular, focused work.

Joe: *To me, that might seem – what I would say is – nonproductive, because it's out there for everybody to see, whereas the water-cooler is a passing thing that isn't there,*

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recorded. Most people would be shy. I mean, should that be stated in some policy or – how do you manage that?

Dana: I always talk formalizing the informal. When you're in the virtual world, some of the things that you have to do is formalizing what normally, just kind of accidentally, occurs. Like the accidental bumping into somebody else who shares your passion for something. How do you formalize a way to be able to do that and support participation in it. What I recommend – I definitely don't recommend full policies of it, because the more policies and rules and regulations you play against it, the less anybody is going to want to participate. Usually, what I do is I say, "Hey, you know, why don't you guys figure out some way to formalize the informal way that you want to get to know each other and build relationships with one another. As a leader of virtual teams, you're the one who needs to model that behavior by being vulnerable, by putting yourself out there and sharing something funny about your life, or something that you normally you would just share with somebody as a passing remark. It becomes a little bit more – these days, with Facebook and everything, there's so much of our personal life that is cemented forever. Kind of, innocuous water-cooler conversations. Talking about what you're posting on Facebook on the weekends, right?"

Joe: *That's probably true, and when you pop up, everybody has their last four days history or sidebar there anyway half the time, right?*

Dana: Exactly. Model the behavior. Don't forget to be vulnerable and human. Take time at the front-end of conversations to really check in with folks about what's going on in their world, because it can affect the way that they're showing up, and how would you ever know

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that somebody just got married, or maybe somebody lost a loved one and they haven't been as attentive to the work that's been going – if you don't know that back-end of context and you don't take the time to ask, then you won't be able to handle it appropriately as a leader and give them the support that they need. I think – one of the biggest things for virtual leaders when attending to their team's general happiness – we know that a lot of building trust and having engagement in the work that people do – having purpose, autonomy and mastery tends to be the things that keep people loving the jobs that they do. With virtual teams, what happens a lot is that they actually burn themselves out by overworking because they don't ever have to leave work in order to get home. For virtual leaders, one of the biggest things I attend to is to watch out for your team. If they're giving work too much focus, to support them, to refocus that balance on work-life stuff, because it's not that your virtual team workers will be less engaged – in fact, you're likely to experience burnout from them, than you are, you know, secret times where they're not working and doing other things.

Joe: *I have to ask you this question. Should, as a virtual team leader – should I be joining people on Facebook and LinkedIn and connecting with them, or even seeing what's happening in their lives?*

Dana: Yeah. It's really interesting that there's this more, kind of, muddling together or building this whole-self. There's a statistic that says – by the year 2017, 50% of the workforce will be millennials. They grew up in this whole digital age where their whole-self is exposed – where they're able to IM their friends who are not at their workplace while at work, to make sure that they've got the right plans for what's happening, so that they can

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focus on work until the evening plans come, or whatever. There's this blending of the work-self and the home-self, or the friend-self – all the roles that we live in and that we engage in. I think, with more and more digital natives coming into the workforce, you'll see more of that being embraced in that, like, "I am who I am and I show up as I am, whether I'm at work or whether I'm at Facebook. Knowing more of who I am as a whole helps you understand more about me. If you understand more about me, you'll understand the things that I'm motivated for and the things that I want to achieve out of the work that I do, etc. I think it's culture-dependent. However, I don't hesitate if a colleague or a client, or a coworker wants to be a part of the inner circle to do that. As a participant in Facebook, it's really up to me to manage, to self-manage, how it is that I'm really showing up, if I choose to let my professional realm enter my personal realm. I really think it becomes a personal choice in that – though, it's really great to be able to connect with a coworker who's seen my Facebook page about, you know, – I got married three weeks ago. We talk about the event, and they've already seen and they've already had experience because they saw pictures on Facebook or something. That makes for a much easier, quicker transition into talking about important things in our world.

Joe: *You make a great point there, because that question could be just from my cultural, or my age – that I think about that where someone who is thirty would not have a second thought about that.*

Dana: That's right. I think it's interesting – the generational gap or experiences of what it looks like to work in this new, virtual, distributed world. We were having this conversation in a blog post on 'Interaction Associates' about how people feel comfortable when they can't

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be face-to-face, and some folks feel exhausted if they have to watch a video of themselves while looking at a video, or a webcam, of other people that they're talking to at the same time, and feel like they can be more focused when it's just a phone call. Others, including myself – I feel like I'm missing out on the conversation if it's just over a conference call, or just over the phone, because I can't see people's reaction, or give my own emotional reactions so they can see my reactions to whatever it is that they're sharing etc. There definitely is this, kind of, initial comfort – more comfortability with some of the tools and how we've grown up in our experience of those things that colors our willingness to be able to either try it out, or utilize it, right? We all fall back on our old ways of doing things. That's what's so hard about change.

Joe: *What's upcoming for you and how can someone contact you?*

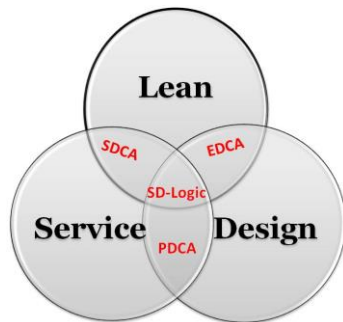
Dana: I am working with 'Interaction Associates' on developing some next generation live online learning programs around some of these leadership capabilities like 'leading change', and 'facilitative leadership', and doing all of these things. You can learn more about the programs that IA offers at InteractionAssociates.com, and you can connect with me via e-mail at, dsednek@interactionassociates.com and that's D, as in Dana – Sednek, S-E-D-N-E-K. You can also connect with me, of course, via twitter. My handle is 'daynstar', D-A-Y-N-S-T-A-R-R. Feel free to send me a tweet. You can also connect with me on LinkedIn. I'm everywhere.

Joe: *I want to thank you very much for your time. It was a great experience for me. I've learned a lot, and I hope everybody else did too. Thank you very much, Dana.*

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Joe Dager is president of Business901, a firm specializing in bringing the continuous improvement process to the sales and marketing arena. He takes his process thinking of over thirty years in marketing within a wide variety of industries and applies it through Lean Marketing and Lean Service Design.

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