

# Business901

Podcast Transcription

Implementing Lean Marketing Systems



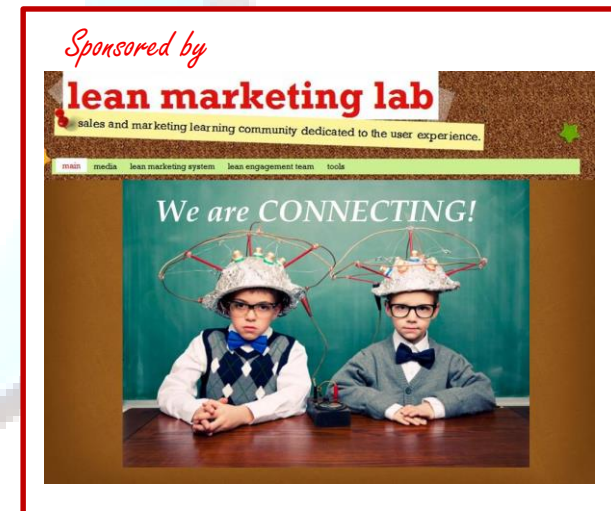
## Relationship Building thru Technology

Guest was Liz Guthridge

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Liz Guthridge is a results-oriented, award-winning change leadership coach and consultant with extensive communication experience. I specialize in supporting department leaders of organizations who are introducing complex new initiatives or making other changes that may confuse, disrupt or upset internal stakeholders.



Liz provides on-the-job, just-in-time training to staff members, so they can become indispensable go-to change leaders and strategic communication advisors. This means leaders are able to build capacity and capability to manage constant change, communicate about it clearly and credibly and ensure that new changes stick.

Connect Consulting is an independent and specialized management-consulting firm focused on clear and credible change that sticks. Founded in the San Francisco Bay Area in 2004 by Liz Guthridge, Connect works with:

- Department leaders of organizations who need to introduce complex new initiatives to employees who are confused, angry or in denial about the change.
- HR leaders who want to develop greater change skills and experience inside their organizations, so they'll have internal staff members who can provide strategic counsel and support.
- Communication professionals who want to become more strategic in their work, especially so they can provide better counsel and advice to the leaders they support.

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## Transcription of Podcast

**Joe Dager:** Welcome, everyone. This is Joe Dager, the host of the Business901 podcast. With me today is Liz Guthridge. She is the founder of Connect Consulting Group. She works with leaders of Fortune 1000 and national associations to implement high-risk strategic initiatives. Her expertise spans the fields of employee communications, research, and change leadership. Liz, I would like to welcome you. The first thing I have to ask you, your byline, "Clear, credible change," how does that apply to your organization, Connect Consulting?

**Liz Guthridge:** Great. Well, thank you for having me, Joe, and yes, my byline, I try to role model my byline by being clear and credible with change. I have to say, though, that these days, I'm not emphasizing the word "change" as much, because everybody is very change-weary, and we certainly don't like to be managed around change. Yet, we have to change constantly, and it has become a phrase that I don't like, but it's the new normal. We're in an era where everything is under interchange although that's not the best word for it.

**Joe:** Have you just replaced it with something else?

**Liz:** I'm talking more about the importance of getting clarity, alignment, and focus in organizations. When you do that, you can build unity. We can go faster better, and that will also make you... If you start to look for clarity, alignment, and focus, you're showing more respect to people, which is an important part of Lean, and you're able to build more credibility and trust, which is so important, because trust is in such a decline in our society these days.

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**Joe:** Well, I connected with you through the Lean world, and I see that when I look at your website, Lean doesn't jump out at me, how does Lean apply to your work?

**Liz:** Well, Lean is a little bit for me like change. I tend to do the things in a Lean way, but I don't talk about Lean, just like I don't talk about the word "change" that much. Basically, with me, Lean, the principles are so critical, this idea that you need to figure out, what is your value? You need to eliminate, and especially in the communication and change world; that's eliminating clutter, and you need to be always continuously improving. A few years ago, I was working in several very, very different organizations. I was working in one organization helping them introduce process thinking as well as Lean, and then I was working in a couple of other organizations that were in bankruptcy. All of a sudden, I realized, "These BK clients are awfully similar to the one who is being very successful with Lean, in which they have to work in a much disciplined manner, and they tend to be very clever."

I started thinking about it, and I said, "I think this means that I need to write and work in a Lean communications fashion," so take Lean principles and apply them to communications.

**Joe:** Lean is really changed management, per se, isn't it?

**Liz:** Yes, because what are so critical, people don't realize, is you need to start with value. When you're dealing with soft topics like communication and change, sometimes there's an inclination that you just need to do more, and more and more, and more. In today's world, where we have so much information at our fingertips, we're dealing with information overload, information obesity. That's why it's so critical to figure out what the value is, cut

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that clutter, and really help people get clarity about what you're trying to do, what we're trying to do as a group, and really help people focus.

**Joe Dager:** You talk about doing that with peer-to-peer practices. Can you start off here with a basic introduction to peer-to-peer practices?

**Liz:** Sure. Peer-to-peer, I think, is an incredibly important concept in change these days, because we've got a number of things going on in society. We've got the complexity of work; we've got the speed at which we need to work; we've got technology; we've got organizational change, which is very flat compared to where it was a few years ago, and we've got change in attitudes. As I mentioned a minute ago, people are not as trustful of authority figures anymore, so they tend to trust their peers more, and especially peers who are doing the work, close to the work, close to the customers. Those peers have a lot of trust with others. If you as a leader or a change agent in an organization can work with your fellow peers to get them to figure out how to implement change...

You don't just give everything to the people, but if you give your peers some direct, "OK, here's where we're trying to go. What's the best way to get there?" peers are often a very effective way to go, the idea that the wisdom is in the crowd.

**Joe:** I think it's interesting because in the sales and marketing world, it was always about reaching the decision maker and reaching that person who's going to make the decision. Now everybody is so influenced by these people that you may not be able to reach; they may be in this department over here, or in this department over here, that to get advice, it's really difficult, when I think of a sales and marketing perspective, of marketing to a peer-to-peer network.

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**Liz:** Right. It is a lot more challenging than it used to be because everything is so much more diffused.

**Joe:** Is this all new? Has it been around a while, and we're just realizing it now? Has it just come to the surface now?

**Liz:** Well, I think it's always been around because people always will want to say to friends and colleagues, "What do you think about this? What are you doing?" and all of that. But what's happened is technology has just made it so much easier to connect people and to amplify what people are saying. Also, I think the complexity of the work world. Leaders start to realize, "Oh, my gosh. I don't have all the answers. There's no way that I have all the answers, but I have all these people who are close to the topic. Let me ask them what they think."

So, for example, I've got a client who sheepishly admits that, even though their new fiscal year has started FY13, they have not finished their goals for the year. They're having some challenges because they've got some extreme...trying to balance some profitability with growth.

What they've decided to do, and we talked it over, is to go out to the extended leadership team and say, "OK, here is what we want our goals to be. What do you see as the top three obstacles to achieve that? Also, how do you think we can fix it?" We're doing just a simple survey. It's this idea of crowdsourcing.

We're getting the technical wisdom of the crowd to gather the information. We're going to supplement it with some individual interviews and then bring it back to the leadership

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team. They're going to sort through, and they may do another pass with the extended leadership team. It's something probably unheard of for them to do, let's say, five or so years ago.

**Joe:** You're saying bringing that voice in, or as we term it a lot of times the voice of customer, voice of market, bring it in, but you have to do it in different ways. You've got to respect some of these peer-to-peer practices?

**Liz:** You've got the peer-to-peer. You've got the voice of the customer. You've got the voice of the employee, the voice of the extended leader. If you can listen to those voices, you can get much more targeted information that's going to help you. You can't just get information for information's sake. It's got to be very clear questions. Then the other real advantage is that people really do like being listened to. They like having their opinion asked, and they also may have some really good ideas. You don't necessarily just have to stop with the ideas.

Thanks to technology we're now able to do more with what I call smart mob organizing, which is this idea of getting groups together through collaborative technology to share ideas and then start filtering and working with those ideas to decide what would be the best thing to do.

Because there can be some anonymous aspect around this, people are looking at it as it's much more data-driven than just getting people in a room and saying, "What do you think about this, and what do you think about that?"

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**Joe:** Is it because you can capture this data easier when you're doing it, let's say, on the web?

**Liz:** Oh, definitely you can capture it better. For example, I do a lot of work with Powernoodle, which is a relatively new tool. You are able to have people participate anonymously. It's an online cloud app, and you can pose a question, get a bunch of ideas, and then ask people. You combine the ideas, condense them so that it makes it more manageable to work with, more refined. Then you ask people to vote on the ideas. Give them a number of votes and say, "OK, of these votes, which ones, based on our criteria, do you think are going to work?" Then you can refine that even further. Again, because it's anonymous, people are just looking at the idea, not who said what. Then you can give people's money to various votes.

When you get finished, you're able to spit out an Excel spreadsheet that captures the top ideas. Even better, it includes everything that was brought up in the session so people can see that, yes, their idea was there, but it didn't get the votes from everybody else.

**Joe:** It is still very metric-driven, what you're doing. But you're just targeting it and defining it better by, let's say whether it's social networking or using it through the web or the LAN within the organization.

**Liz:** Right and people like the fact that it is mentored-based as opposed to pure gut.

**Joe:** Could you explain smart mob organizing for me?



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**Liz:** Smart mob organizing came from the book about a decade ago called "Smart Mobs: The Next Social Revolution." Back then, the concept was about giving power to the mobile many. Over the past 10 years it's evolved, especially inside organizations, which is where I work and play, about bringing together a group of employees for a common business purpose. You generally use technology and electronic media or classic technology like the Povernoodle I mentioned. One of the advantages of doing it with the technology as opposed to in person is that you can cast a wider net and get more people to participate in more geographical areas. You don't have to all be in person. You can hear more diverse voices because of that, especially the ones who are quiet, who are not necessarily going to speak up in you're in a face-to-face session.

It's also really well when you want to do something quickly because you could run a session, get people to generate ideas. You can do it in, depending upon the complexity, as little as 90 minutes or so from start to finish. Or you could spread it out over a week or several weeks, depending upon how much people need to do, think about it, and do other things.

So, for example, I recently did for one of the professional associations I work with, they were doing their, it's kind of embarrassing for them to admit, first strategic plan. They were gathering in the Bay Area, which is not too far from where I am, but we only had basically that seven hours to work in total. They had to have a regular meeting as well, a business meeting.

What we did through Povernoodle was to do a SWOT analysis, and we did a SWOT analysis with a double T, not only looking at threads but also trends. I had a question for each.

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They had a committee setup to be working on their mission statement, and that committee had gotten totally bogged down. We did a smart mob organizing around the mission statement.

By the time they got together in the Bay Area and we had finished the smart mob organizing and I had looked at all the data, put it together for them in a report which we presented, we were able to come up with a very sound, strategic plan. Basically, a one-pager was objectives, goals, and tactics in five hours.

**Joe:** It sounds like reverse school or reverse learning- where you bring the homework into the classroom.

**Liz:** Exactly. It's perfect for flip learning, yes.

**Joe:** You're having discussions about things they value rather than taking the time out to explain this or do this survey or do this. You're jumping in with both feet when you walk in the room, aren't you?

**Liz:** Exactly. That's why I think one of the things that flip learning is so effective as well as the smart mob organizing type-techniques because what you're able to do is you're able to level set in advance because people are working with concrete material, not just fluffy ideas but concrete stuff, and are getting much more comfortable with the concepts, a better idea of where they think the organization should go or the team should go. When they come together, either on a phone call or a video conference or in person, you're able to have a much more thorough conversation, a richer or more robust conversation, a real dialogue rather than talking at one another.

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**Joe:** I realize that social media and technology has driven more collaboration, but are people ready for this? Are they embracing this? Or is there still a lot of hesitancy?

**Liz:** It really depends on the situation. I think when you come back to having effective change, which again, is one of the areas I work in, I still believe and the research points out that you need to have three things into play. You need to have a will, which is the motivation. You need to have the skill, the ability, and you need to have a hill, to get people over the hill, to get over the barriers. Sometimes getting over the barriers can be the most difficult of the three. If you don't have anybody who's motivated and who doesn't want to try the new technology, who doesn't want to play in social media, I think it's really hard to get any traction there.

With my professional association, these were society transplant social workers. This is not a group that really loves technologies in the way they work. They're social workers. They're talking with people all the time, yet they felt that their backs were against the wall. They really felt that they needed this plan. They had frittered the time away.

When I talked with them about some of the ways we could get at this, they said, "You know, this sounds pretty interesting. This is worth a try." So they were really good sports. We were able to do it. We allocated about three and a half weeks for them to participate. It was during summer vacation for a lot of them, but they still participated, and they did it.

**Joe:** I see this technology, but it's not as widespread as we have a tendency to think it is. Is it?

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**Liz:** Correct and you also can't make always assumptions. I mean some people that you think might not be the ones who want to play with the technology might be different than it really is.

**Joe:** When we sit there and talk about changes, has the internal change agent and how the consultant interacts with people, has that facilitator role changing a lot nowadays?

**Liz:** I think the internal change person's role is changing dramatically because we cannot do the expert/idiot model anymore. People just do not have the patience. They feel like they're not being respected. They're not being acknowledged for all that they bring to the organization. Even though change experts who study change, work with change, and all that have deeper knowledge about change, we can't just discount what the everyday person brings to the party because their instincts are often very, very good.

The internal change agent and the consultant need to become more of a coach, and they also need to become more of a curator in an idea of sharing best practices, making sure that cross-pollination happens, especially people tend to be sometimes in silos. It doesn't often happen as much in a Lean organization, but it certainly happens a lot in other organizations.

What I talk about a lot with people, what I try to do myself, is this idea that you are more like a Tom Sawyer than you are the Mark Twain, who created Tom Sawyer. For those of you who are listening who are familiar with Tom Sawyer, Tom Sawyer got a group of kids together not only to help him paint the fence and do the work, but to enjoy the experience.

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They were able to get phenomenal results, as opposed to being the expert who's going to come in and tell you what to do.

**Joe:** People are really looking for more of a not an expert assistant, but more of that person who's going to work with them through the process. As I always term it, when we go to a conference anymore, and you ask someone what they enjoyed at the conference, it's the coffee breaks.

**Liz:** Exactly, which is why open space was created more than 25 years ago by the guy who observed that and said, "Let's just have some structured conversations to see where we can go." That's where the peer-to-peer works, of which open space is a great example. That's been in existence now for 25 years. Back to the point, where it often helps to get people to volunteer to participate, you get people who really want to do these things, who enjoy that, and that can spread to others.

**Joe:** When you think of all the automation, all the data, all these things being applied, or you have at your fingertips now, and the metrics you can get, it seems tribal knowledge is more important today, or maybe that's at the forefront of what we're talking about, we have to make sure it doesn't get lost in all this sea of data. Is that one way to put it?

**Liz:** Right, the capturing of the tribal knowledge, and making sure that people are working with it rather than extraneous stuff.

**Joe:** When we talk about connected company, and a company of the future, we get away from that org chart. Is that org chart broken, or is that still a viable way to run a company?

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**Liz:** Well, I think everybody needs some organization, because otherwise you're going to have chaos, but I think organizations will continue to stay flat, or flatten, and you need to make sure that you've got clear roles and responsibilities. Even the concept where everybody leads from where they are, sometimes you're going to lead with a capital L, and other times you're going to lead with a small L. That just needs to be very explicit.

**Joe:** So there still has to be some hierarchy there within an organization and someone with the ultimate responsibility of leadership.

**Liz:** Right, because otherwise, if everybody's in charge, nobody's in charge. Another thing I've done over the years, which I really don't talk about that much, but I certainly bring it to my work and my life, is at the tender of 18, when I was going to college, I became a registered professional parliamentarian with the National Association of Parliamentarians. So I am an expert in Robert's Rules of Order, and over the years, I've maintained that I work with organizations whom I like to support, and all of that. Having been an expert in Robert's Rules of Order for two-thirds of my life, which is a parliamentary procedure joke, since that's often a way to take votes, I see that when organizations don't have any order at all, it is incredibly chaotic, people don't know what they're supposed to do, what they're trying to achieve, and all of that.

There needs to be a type of structure that is appropriate for big organizations and for the situation. Now, that's not to say that things can't be moving all the time, because they can, but just that we have clarity around that. Be very explicit if you're going to be very flexible and nimble.

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**Joe:** There's got to be, maybe, an informal go-to guy, but there still needs to be a formal go-to guy when there is an issue to address.

**Liz:** Exactly, and that formal go-to guy may be in his or her role, let's say, for 18 months, and is going to transfer out and somebody else will take on that role, which is how it's often done in nonprofits, which can be very, very powerful, because it gets shared leadership and shared tribal knowledge. That may not often work well in publicly traded organizations, but who's to say somebody couldn't try it sometime?

**Joe:** We talk about peer-to-peer, smart mob, crowdsourcing. When is a good time not to use these types of things?

**Liz:** Well definitely, I think, right now, in what's happening on the East Coast with Hurricane Sandy is a great example. You still want command and control in those types of crises.

**Joe:** When push comes to shove, when you have to get something done very quickly and in a very orderly fashion, sometimes command and control are the right way to proceed.

**Liz:** Right, because in a situation like that, when people are under extreme duress, and oftentimes they're not only under extreme duress, but horrible things have happened to them and their families, and they often not might have the training, so we get back to they don't necessarily have the skills or the ability to know what to do when power lines are down and everything like that. You want to look to the experts who've trained in that very, very specific body of knowledge.

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**Joe:** I thought I read somewhere where you were contributing to a book.

**Liz:** The book is "The Change Champion Field Guide." It's the second edition. Jossey-Bass is going to be publishing it, probably, in May of 2013, so about six months from now. My chapter is, surprise, surprise, "Change through smart mob organizing, using peer-by-peer practices to transform organizations."

**Joe:** What makes it a field book?

**Liz:** What makes it a field book is a number of us are contributing, including some folks on appreciative inquiry, which is a form of peer-by-peer, and a bunch of other different topics, so the fact that it's not one definitive way but a whole variety of ways to implement change.

**Joe:** Is there something that is peculiar to the peer-to-peer networking, or to the crowdsourcing that you'd like to mention?

**Liz:** We covered a lot of things. I just would emphasize the point that you were talking. It's not for everybody. It needs to be in a situation where you have people who are willing to participate, who find it's exciting to share their opinion and work with others; it's a good problem and something that you're going to do something with; it's not just window dressing, something that you can then preferably build on and do other things with it.

**Joe:** You have a great blog. The only thing that I probably will mention about it is you don't right enough; I enjoy reading it.

**Liz:** Thank you.



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**Joe:** Could you tell me how could someone contact you and your website?

**Liz:** Sure. My website, and it's a long one, is [www.connectconsultinggroup.com](http://www.connectconsultinggroup.com), so all three words smushed together. The blog is one of the tabs there, and I do blog just once a week. You can sign up for a report on mistakes people often make when leading change, and get my newsletter.

**Joe:** How often does your newsletter go out?

**Liz:** I do two newsletters a month. One is "Connect Collections," which is my curated items which I think would be of interest to people, and then the other one is "Connects Creations," which is one of my blog posts, with generally additional commentary.

**Joe:** Well, I would like to thank you very much, Liz. This podcast will be available on the Business901 iTunes store and the Business901 blog site, so thanks again.

**Liz:** Thank you for having me. I enjoyed it.

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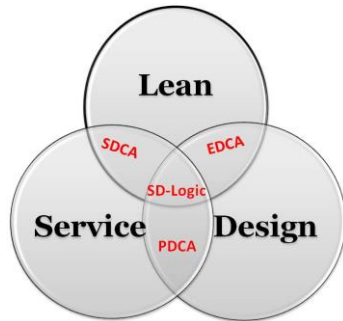
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Joe Dager is president of Business901, a firm specializing in bringing the continuous improvement process to the sales and marketing arena. He takes his process thinking of over thirty years in marketing within a wide variety of industries and applies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

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