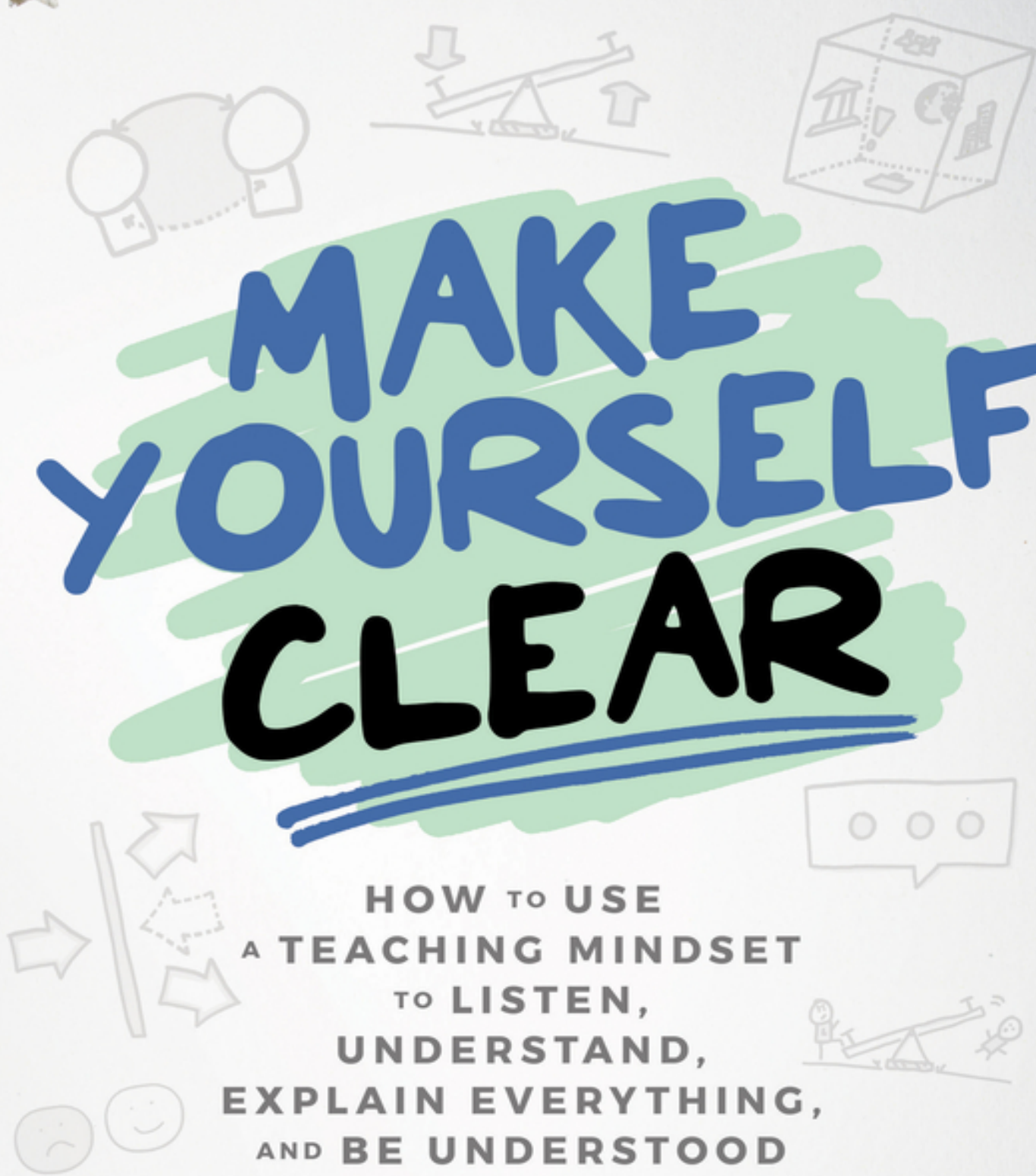




MAKE YOURSELF CLEAR

HOW TO USE
A TEACHING MINDSET
TO LISTEN,
UNDERSTAND,
EXPLAIN EVERYTHING,
AND BE UNDERSTOOD

RESHAN RICHARDS
AND
STEPHEN J. VALENTINE

WILEY

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“This is a book of practical magic. Reshan and Steve know that education is a transformative force. In *Make Yourself Clear*, they give us a case study in the power of great teaching, applied to an unexpected field: business. The result is revelatory. This is alchemy we can use.”

—*Jim Best, head of school, The Dalton School*

“With their clear and concise style, Richards and Valentine relate successful teaching and learning practices from the classroom to their less obvious counterparts in business, especially sales. Everyone sells something, so anyone can apply their mantra of ‘authenticity, immediacy, and delight’ to their everyday life.”

—*Merrick Andlinger, private equity investor, president, Andlinger & Company*

“Be a clarifier – not a confuser. This book helps sales and service leaders cultivate teams of ‘teachers’ who can help prospects and customers make meaning out of all the information and choices they face. The sales and service humans who don't get replaced by AI functionality will be those who can give people a way of processing their experiences into strategies and decisions.”

—*Tim Reisterer, coauthor of The Three Value Conversations and chief strategy officer, Corporate Visions*

“My audience (startup founders, technical decision makers, and software engineers) by definition have chosen careers where continually learning is their biggest competitive advantage. In addition, as they move from startups to big companies and back, they work in roles that didn't exist 10 years ago (for example, data scientist and ecosystems developer). Selling in the traditional sense is an immediate fail to these professionals. Reshan and Steve have accurately described a business methodology of teaching and learning that adds value to this audience and operates in their modern currency: knowledge.”

—*Tejpaul Bhatia, startup lead, Google Cloud, New York*

“Richards and Valentine's *Make Yourself Clear* is the first book that I know that capitalizes on what we've gleaned about teaching and learning as applied to business in an age of technology. Whether leading in a school or corporation, or navigating the challenging leadership role of a parent, the wisdom in this book

promises to inform your actions. Buy it, but most importantly – read it.”

*—Pearl Rock Kane, professor of education, Teachers College
Columbia University*

MAKE YOURSELF CLEAR

**HOW TO USE A TEACHING MINDSET TO
LISTEN, UNDERSTAND, EXPLAIN
EVERYTHING, AND BE UNDERSTOOD**

RESHAN RICHARDS AND STEPHEN J. VALENTINE

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Reshan dedicates this book to Jennifer, Grayson, Finley, and Riley.

Steve dedicates this book to Amy, Chloe, and Hunter: drummers on pots and pans.

FOREWORD

In my work at Columbia University, I teach graduate students, coach senior executives, and speak globally about learning as a professional capacity. My conversations with business professionals, corporate executives, and academic leaders regularly address the need to augment learning capacity in order to expand employees' skills, increase the potential for individual career advancement, and improve overall corporate results.

Companies who adopt a culture of learning attract and retain top talent, make well-informed business decisions, and ultimately increase profitability. Too often, corporate learning initiatives are relegated to a defined unit within an organization, such as skills training programs overseen by the human resources division. Such narrow initiatives have limited impact on employee development and ultimately fall short of their potential to improve overall corporate performance.

To maximize the impact of learning initiatives, leaders should establish an environment dedicated to teaching and learning at all levels. When all leaders – from top-level CEOs to middle managers and situational leaders – engage in corporate learning initiatives, it sends a powerful message that learning is taken seriously throughout the organization.

As an educator and consultant, I witness, daily, the benefits that embracing a teaching mindset delivers in the corporate environment. The scholar-practitioner model at the Columbia University School of Professional Studies offers a compelling example of how teaching by business leaders can accelerate learning, skill development, and business success. Our instructional model harnesses the teaching capacity of corporate leaders in the classroom. When scholarship informs teaching, teaching then enhances the practice of professions, which, in turn, reinforces scholarship – creating a virtuous circle that benefits students, faculty, scholars, and professions alike.

A teaching mindset also has application in interactions with external clients. The financial sector widely embraces education as a means of gaining clients and retaining them in the long term. For example, investment firms educate prospective customers by

delivering information that is useful to them when making financial decisions. Consumer banks employ a teaching approach through the growing practice of providing analytics services to their customers. These personalized data points, based on an individual's banking transactions, provide customers with new insights into their financial health and likely contribute to brand loyalty.

In *Make Yourself Clear*, career experts Reshan Richards and Steve Valentine define teaching capacity and discuss its application in the business world. They harness their expertise to present techniques that skilled teachers use every day to build understanding in others. Their combined teaching experience – ranging from elementary through graduate school to corporate universities – provides them with unique insights into the ways educational strategies can be leveraged in a commercial environment.

Applying teaching methods in a corporate setting unleashes novel approaches to establishing and growing business relationships. When adopting a teaching mindset, sellers consider multiple approaches to listening; customer service agents consider an array of techniques to demonstrate understanding and empathy with their customers; trainers assess learning to promote knowledge and skill development, rather than simply conferring a certificate; and leaders communicate to be understood, changing their tactics to influence different learners.

Reshan and Steve describe the value of striving for authenticity, immediacy, and delight in the corporate landscape. Their approach highlights the importance of bidirectional communication with both internal and external constituents to create long-term business results. Reshan and Steve provide a new context for what these terms mean in the technological age, converting authenticity, immediacy, and delight into a powerful heuristic for sales professionals, customer service agents, corporate trainers, and leaders at all levels.

– Jason Wingard, PhD
dean and professor
School of Professional Studies
Columbia University

ACKNOWLEDGMENTS

The expression “no book arrives in the world without the support of many people” is certainly true for the book you are currently reading (thank you for reading, by the way). But, given that this is a book about teaching, we have to add a wrinkle: no book about teaching arrives on the shelves without the support of many teachers.

We have had more than our share – good people who found their way into our lives and cared enough to try to teach us something that, they felt, mattered in a way that, we felt, mattered.

The what and the how, with emphasis on the how. And now onto the who ...

Reshan would like to acknowledge: Ms. Muller, Ms. Ryder and Miss Hess, Ms. Bhagia, Mr. Love, Mr. O'Leary, Ms. Rota, Mrs. Milliren, Mr. Lacopo, Mr. Wood, Coach Barile, Mr. Jones, Dr. McCall, Carlton Voss, Professor Currier, Professor Dede, Professor Meier, Professor Vasudevan, Professor Yorks, Dr. Ahmad, Dr. Mentor, Professor Budin, Professor Genishi, Bill Walsh, Deborah Herschel, Darian Levin, Tom Golden, Michelle Dowling, Joyce Evans, Matthew Stuart, Chris Marblo, Don Buckley, Jason Wingard, David Stephens, and everyone on the Explain Everything team.

Steve would like to acknowledge: Ms. Cinotti, Mrs. Fitzgibbons, Coach Fox, Coach Yergey, Professor Von Hendy, Professor Matson, Fr. Michael Himes, Boyd White, Gray Smith, Michael Brosnan, Chris Howes, the *Klingbrief* Editorial Board, Dave Flocco, Deb Jennings, Gillian Branigan, Kerry Verrone, Maria Shepard, Erica Budd, Jill Maza, Tom Holt, Caroline Toman, John Jacobs, David Korfhage, Mark Bishop, Geoff Branigan, Tony Cuneo, Bill Stites, Dennis Hu, Jordan Raper, Nicole Hoppe, Tony Jones, Dave Hessler, and the mysteriously named “CAC.” Plus: Amy, Gus, Kathi, Jim, Judy, and Vicki. And: Kyle, Justin, all the Joes, and all the sections, over all the years, of English 1 in Room 13.

Our hope is that the readers of this book will be better off because of the teachers that we met along the way, who helped us to learn,

whether they knew it or not.

Reshan and Steve would also like to acknowledge the formidable crew that has helped us to learn together, with particular nuance, the art and science of teaching: Tom Nammack, Karen Newman, Pearl Rock Kane, Eric Hudson. Thank you for your deep wisdom and your commitment to your craft – our craft.

To our researcher for [Chapter 1](#), Ethan. Thanks for seeing the connections.

To our editors: Jeanenne, thank you for seeing us. Vicki, thank you for shaping us with the kind of thoughtful feedback that few writers these days are fortunate enough to receive.

And to those brilliant people we interviewed for this book: you (the reader) will want to thank them yourself, and we hope that you will do just that by tuning in to their work and telling them what you've learned from it.

Otherwise, just start turning the pages...or this might go on forever.

ABOUT THE AUTHORS

Dr. Reshan Richards is adjunct assistant professor at Teachers College, Columbia University and associate at the Columbia University School of Professional Studies. He is also the chief learning officer, CEO, and cofounder of Explain Everything, a software company. He has an EdD in Instructional Technology and Media from Teachers College, Columbia University, an EdM in Learning and Teaching from Harvard University, and a BA in Music from Columbia University.

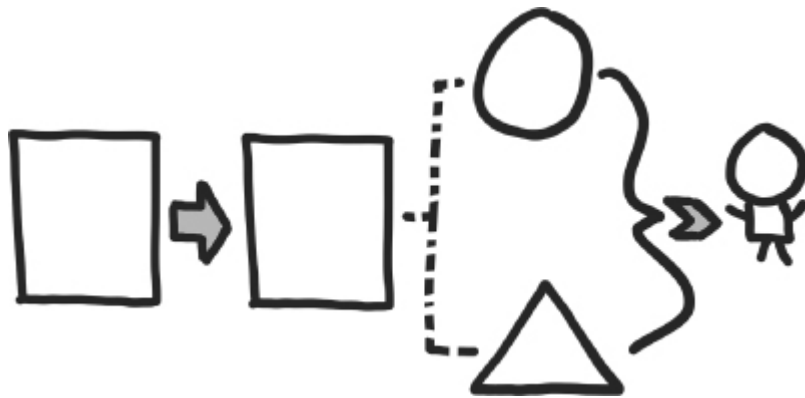
Stephen J. Valentine is an educator, school leader, writer, and serial collaborator. He works with great people at Montclair Kimberley Academy (Montclair, NJ), serves as the coordinating editor of *Klingbrief*, a publication of the Klingenstein Center at Columbia University, and wrote *Everything but Teaching* (Corwin). He holds degrees from the University of Virginia and Boston College.

Reshan and Steve have coauthored a number of publications, including *Blending Leadership: Six Simple Beliefs for Leading Online and Off* (Wiley/Jossey-Bass). Both separately and together, they speak, teach, consult, and launch learning experiments across a variety of domains and in locations worldwide.

They document their learning, mistakes, and enthusiasms at www.constructivisttoolkit.com and www.refreshingwednesday.com.

INTRODUCTION: WORKING AT THE INTERSECTION OF TEACHING AND BUSINESS

Throughout this book, we're going to connect two fields, teaching and business, in order to explore the benefits of embracing a teaching mindset in a corporate environment. Simultaneously, if all goes well, by becoming a better teacher, you will learn how to enrich the lives of your audiences, and even better, the scope of your industry.



More specifically, we're going to show you how teaching practices (the stuff the best teachers use daily) can:

- Enrich approaches to selling ideas, products, and services to new (or ready to expand) customers.
- Enrich approaches to providing services to existing customers.
- Enrich approaches to making colleagues understand, demonstrate understanding of, and apply that on which they are being trained.
- Enrich approaches to developing and managing teams and individuals.

We're also going to show you how to think of and serve your customers and colleagues as modern learners – because that's exactly what they, and we, all are.

Learning (for a New) Now

The “new now” of learning is transdisciplinary, interdisciplinary, and multidisciplinary. The modern learner-practitioner, whether she is a teacher, learner, employee, seller, or buyer, has been unboxed and unbounded – invited to be combinatory and connective and to solve problems that matter. The modern learner-practitioner has full permission and agency to think across domains, between silos, and using all available perspectives. One should plan accordingly.

Learner-Practitioner

We have a preference for this compound noun (learner-practitioner) and will use it throughout this text because we believe that even our youngest learners are practitioners (they are trying to be writers and scientists and artists) and even our oldest practitioners are learners, or should be.

There's an old, and good, justification for breaking down the artificial boundaries we place around learning: life itself. Outside of the time we spend in school, we don't really live in isolated disciplines, switching from English to math to science, and only when the bell rings. Instead, we live both between disciplines (interdisciplinarily) and across disciplines (transdisciplinarily). We blend and mix aspects of several disciplines, working with teachers and laypeople alike, in order to make progress in a given area, in order to make sense, however temporarily, of the world.

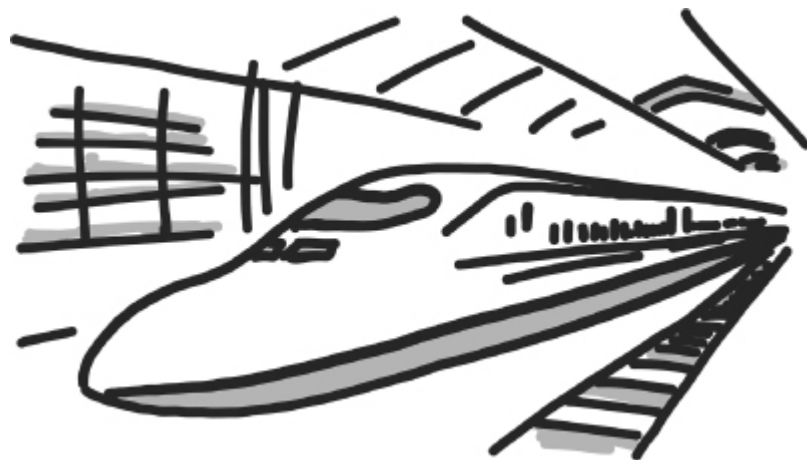
According to researchers, the term *interdisciplinarity* quite simply means an approach to knowledge that takes more than one discipline into consideration. Its driving force, or perhaps outcome, is a social relevance that is not always present in more disciplinary, academic work or research. In short, an interdisciplinary approach can be more stimulating for the learner because it is often more relevant to his or her direct concerns rather than some abstract, possible use in the future.

Transdisciplinarity, on the other hand, has the added layer of being produced with others, especially others who exist outside of what is traditionally referred to as “the academy.” When

professors partner with industry folks to explore a problem, they do so transdisciplinarily (Frodeman & Mitcham, 2007; Frodeman, 2017).

If you track such combinatory thinking, you will see that it pops up again and again like some kind of low-key superhero, often when people are stuck and need to learn something in order to advance a project or possibility.

When working on their Shinkansen bullet train, trains that travel up to 300 kph, Japanese engineers could not figure out how to reduce the sound boom as trains entered and exited tunnels. They turned to biomimicry, or the combination of nature and engineering, to find a solution. Noting that the beaks of kingfishers allowed them to dive into water without making much of a sound, the Shinkansen engineers reshaped their trains accordingly. Once the fronts of the trains resembled the beaks of the kingfishers, the engineers reached their goal, reducing the sound (Moskvitch, 2011; JNCC, 2018).



Combinatory thinking has been used in sports as well. As an engineering student at Oregon State University, Dick Fosbury applied his knowledge of physics to his love for a track and field event: the high jump. Before Fosbury, high jumpers used a straddle jump, jumping over the bar face down. After Fosbury used applied physics to lower his center of gravity, the Fosbury Flop was born, showing athletes that a better approach involved lifting one's hips and lowering one's shoulders. He won a gold medal, breaking the Olympic record, in 1968 (Durso, 1968; The Guardian, 2018).

If you look into the careers of people as diverse as Martin Luther King, Jr., Mendel, and Eratosthenes, you will find religion mixed

with philosophy and literature, botany mixed with genetics, and math mixed with geography and science. You will find, in other words, combinations leading to breakthroughs in human rights, human genetics, and geography.

Such knowledge production is not merely intuitive; it is documentable and therefore, then, repeatable. Some in the academic community have done this work with gusto, categorizing certain approaches and thinking patterns as Mode 1 and Mode 2.

Mode 1 thinking is what many of us grew up with: memorizing and performing in order to pass (through) school. Such problem-solving is isolated from applicability, that is, the real world, but has credence in academic circles. It can be reviewed, and tested, without undue outside influence (Gibbons et al., 1994).

Mode 2 thinking often takes place outside of academic institutions; its context is provided, and defined, by its application, and its intention is pegged to a specific use. What's more, its practitioners, who are often university-trained researchers and scholars, seek collaborative partners outside of university settings (Gibbons et al., 1994).

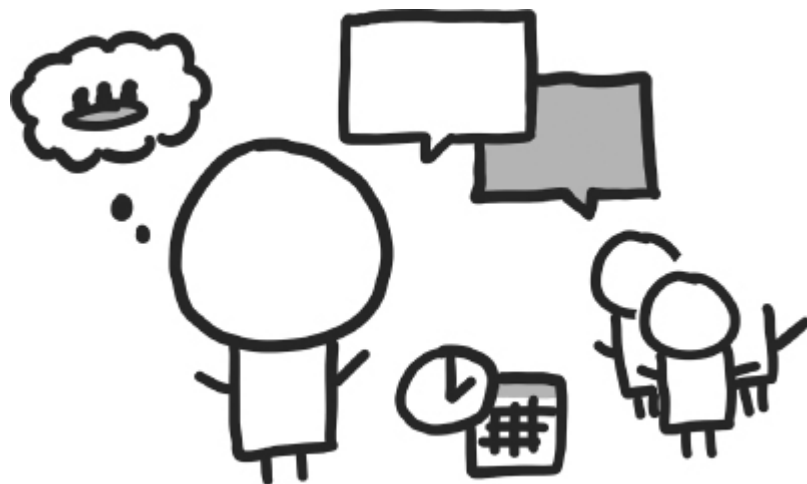
From Business and Teaching to Business Is Teaching

This book is our deliberate effort to highlight and then blend the many connections, parallels, and opportunities for cross-industry learning between working in business and working at schools.

We found that the blending was easy once we began: sellers, leaders, service professionals, and trainers, similar to teachers, benefit from being heard and understood because buyers, team members, colleagues, and existing customers, like all learners, can only take meaningful and impactful action around a cause when they understand that cause and its relevance.



Let's think first about sellers. They face the same “spoiler” problem that many teachers face. In the information-network age, anybody can access information. Buyers can quickly research what a product is and what a product does. Students can quickly learn about everything from simple geometry to the plot of *Hamlet* to the oscillatory dynamics and spatial patterns of a simple predator-prey system (see Brockman, 2018). Buyers can quickly and easily comparison shop. Students can quickly and easily watch several different professors explain the same concept. When you walk in front of a customer, or a class, you're most likely addressing a group that already knows the way the story ends...and all the major plot points along the way. Behaving accordingly is a new norm.



Let's think about leaders alongside teachers, as well. There are numerous ways to organize people and resources as you seek to fulfill the mission and promise of an organization. There are numerous ways to teach well, and very few of them involve constant lecturing. Increasingly, the people being led – and taught – are aware of the many paths and ways available to organizations

– and learners. And you can bet they will analyze, if not publicly question, the choices that a leader, or teacher, makes. Think of how many times you have been called to a meeting and thought, “Did we really need to have a meeting to go over this? Couldn't this have been mediated electronically?” Conversely, think of how many times you have thought, “Why didn't we handle this in person? Why was it done so impersonally?” Or, more pointedly, if you've been in a classroom lately, think about how the simple act of being able to be instantly online has changed your relationship to the material being presented and the person tasked with presenting it. Leaders and teachers alike are dealing with an empowered and connected audience.



Service professionals are facing this audience, too, speaking to them on the phone, hosting them in their offices, or in some instances, walking right into their homes. Done well, this work both resolves an existing issue and deepens an existing relationship, elevating the service professional to the status of a trusted advisor. People connect to a service professional presumably because they cannot solve the problem on their own, using either online videos or forums or the self-service resources made available to them by a service provider. This initial research, though unsuccessful, could mean that service professionals are being greeted, as many teachers are, by customers who have developed significant bias for or against a particular solution. More than ever, service professionals, like teachers, need to be able to identify and break down pre-existing assumptions or flat-out incorrect assertions.



And what about trainers? For a long time in business, traditional training has mirrored the didactic practices of Darwinian models of learning (i.e., survival of the fittest) especially seen in high school and undergraduate programs. The instructor delivers the information. Some of the learners will figure out how to make it work; others will not. Some will get A's, some will get B's, some C's, and some simply will not survive. What's worse is that some will find a way to move through the process without learning what they need to learn – and then face clients or customers or real-world dilemmas without the appropriate skills or knowledge. In a school, this outcome has deep moral consequences (TNTP, 2018); in a business, it not only has moral consequences but also unnecessarily elevates risk.

When somebody is trying to fulfill a role in a business, or teach something, therefore, they will benefit from considering ways that they can tie a product, service, or lesson to a person's context. In teaching circles, this is called “knowing the learner.” Teachers who want to use this powerful approach become specialists in something called “social-emotional learning” practices.

As in teaching, all areas of business are moving away from information transfer and moving toward relevance (for the learner) and application (for the learner).

As a side note, and as educators at heart, we also found that the blending of teaching and business is mutually beneficial.

To sell well is to teach well; to lead well is to teach well; to train well is to teach well; to serve well is to teach well. To teach well – through sales, leadership, training, and customer service – is potentially transformative for individuals, companies, and societies. Everyone can benefit from approaching their work as if

they are functioning in a high-level, truly supportive learning environment.

Teaching is a fundamental resource for companies big, small, and in between, and is a form of business capital. In turn, the highest forms of selling, leading, serving, and training, like the highest form of teaching, add meaning and value to an exchange and can lead to an ongoing, worthwhile relationship that amplifies all involved parties.

There are two foundations for our certainty here: First, reducing asymmetry in business interactions (working toward symmetry, as a good teacher would) is the right thing to do. It's a behavior that most people can practice often, whether they are selling homes to one another, leading change in an organization, pouring one another a cup of coffee, or sending someone an email. It's human decency in action.

Transactional Symmetry

Transactions, informational or otherwise, can amplify both parties involved in the transaction as well as the environment directly affected by the transaction. So, for example, if we are selling your organization a keynote address, we will not provide you with a canned experience or hold back our “best stuff.” That would lead to an asymmetric situation, one where we knew more than the buyer. Instead, we would work with you to understand, and define if need be, the needs and strategic priorities of your organization. If you held back information, or did not engage thoroughly in our discovery process, you would, in, turn, create an asymmetric situation, setting us up to underperform, underdeliver, and tarnish our brand.

On the contrary, if we achieve symmetry in our transaction, we will benefit from synthesizing our most current thinking, not holding anything back, and hitting our target. You will benefit from articulating your needs clearly and from our expertise. And the wider industry in which you operate would benefit from the fact that you would improve authentically and perhaps emerge as a thought leader for peer institutions.

Second, in our networked age, approaching these areas of business as teaching, or aspiring to perform like a teacher, will provide a direct advantage to the seller, leader, trainer, and service professional because it will allow him or her to serve the audience in ways that will be resonant and lasting.

In an interview we conducted with him, Joshua Cooper Ramo, a sage of the networked era, explained the affordances and limitations of our current, networked situation.

We can and should be discerning about what we are connected to, but the great goal in education today is to prepare and encourage kids to be connected to all kinds of things, to be as cross-disciplinary as they possibly can be, and to understand that every object in their lives, whether it's a job or their health or some idea, takes its value from what it's connected to. And that's an amazingly exciting way to think about education. It removes the kind of top-down role of the teacher because, obviously, everybody's connected differently. So you need to be a curator of connections, and an advisor and a guide. Somebody who pushes and challenges a great deal about how those connections are built and assembled. (Richards & Valentine, 2017)

The opportunity to be an advisor and guide to a person – whether a child or an adult – in a connected system is worth pursuing. It adds relevance to your role and value to the learner-practitioners it serves. Ramo's quotation leaves a breadcrumb trail, too, for such work. Connectivity, and the risks and rewards it generates, is first and foremost possible because many people are willing to put their faith in automated systems. Such automation leads to three eventualities: (1) a reward to those who can present themselves as authentic and be “discerning” about authenticity; (2) an increase in the possible speed and number of transactions; and (3) an abundance that comes from an understanding of social constructivism: everything takes its value from that to which it is connected.

Make Yourself Clear

To be clear, then: when the motivated and moral actor (teacher, seller, leader, trainer, service professional) is trying to connect to his or her audience (student, buyer, team member, colleague,

customer), three dimensions of that connection are highly valued in today's fast-moving, information-rich, and highly automated society.

1. Authenticity

Recipients in an information or experiential transaction want to know that a person – not a machine – is the caretaker of the transaction, even if a machine helps to move that transaction along.

2. Immediacy

The transaction should occur at the moment when it is most meaningful and helpful. This does not always mean instantly. It means that both the actor and the audience feel that they have delivered and received the message at the best time for their purposes (not always the same time).

3. Delight

Joy, genuine curiosity, and intrinsically motivated persistence will always be more useful than fear, lack of relevance, and routine. Information, products, experiences, and solutions will continue to exist and be more widely available to audiences. Those that “stick” will do so because they not only address a lingering issue but also add or create new value for the audience.

Though the above can be used as a heuristic (when in doubt, be more authentic, immediate, and delightful), this book is not about a short-term play. It is not trying to help an organization reach a quarterly, or even annual, quota. It has a much longer timeline than that. It is not about one-off transactions, though it might lend them a few ounces of grace. It is not prescriptive. There is no set of steps or methodologies, at least ones that we can confidently stand behind, for exactly how and when to approach information or experiential transactions. Instead, building a teaching mindset will attune you to the nuances and differences – and the affordances and limitations – of the choices available for modes of transacting.

The consistent questions you can continue to address, knowing your audience is asking them, are as follows:

“Is this authentic?”

- Is there a genuinely caring human being behind what is being presented?

“Is this immediate?”

- Is this happening at the right time – the best time – for it to make an appropriate impact?

“Is this delightful?”

- Will I be able to be a better version of myself – doing better things – now that I have had this experience?

This book will help you to understand the ways in which business can be enhanced by teaching and how people in business can adopt a teaching mindset...so as to enhance transactions, start-to-finish, for actors, audiences, and the wider context or field in which the transactions are taking place.

And so, with the intention of helping you to become a more authentic partner, a broker of the right kind of immediacy, and a purveyor of the delight that enhances whatever it touches, we rhapsodically invite you to become a teacher, exploring everything at your disposal to make yourself clear to your audience.

PART 1

AUTHENTICITY

Humans are underrated.

– Geoff Colvin

1

Pursuing Win-Win-Win Scenarios

Teaching matters for business because learning fuels modern day organizations and entrepreneurs. It's not surprising, for example, to find that Adam Robinson is not only the cofounder of a successful test-prep company, but also a chess master. He's a masterful learner, and most likely, through a combination of hard work, intuition, and natural aptitude, he cracked the codes of these two complicated systems and then mapped the fastest routes through them. His operating principle? "Outflanking and outsmarting the competition" (Robinson, 2018).

Folks like Robinson build off the parallels between the art of teaching and good business practices. One of his key insights originates with a behavioral study by psychology professor and decision researcher, Paul Slovic. Slovic studied the effects of information on eight professional horse handicappers, that is, people who bet on the outcomes of horse races for a living. Would knowing more help them to perform better?

In the first round of the experiment, they were given five pieces of information that they deemed most useful for their line of work and were asked to make predictions, based on the information, on the probable outcome of races. In the last round, they were given 40 pieces of information, and likewise, asked to use it to bet on horses.

Here's what happened:

[The] average accuracy of predictions remained the same regardless of how much information the handicappers had... Three...showed less accuracy as the amount of information increased, two improved their accuracy, and three were unchanged. All...expressed steadily increasing confidence in their judgments as more information was received. (Heuer, 1999)



The variance in accuracy is interesting, but the real story begins, as all good con jobs begin, at the point where confidence is built up in the mark. More information, more facts, more supposed insight, did not lead to better outcomes for the horse handicappers. Those inputs only led to *increased certainty* for them, only led to a situation in which they could con themselves into behaving in a way that would not, ultimately, help themselves.

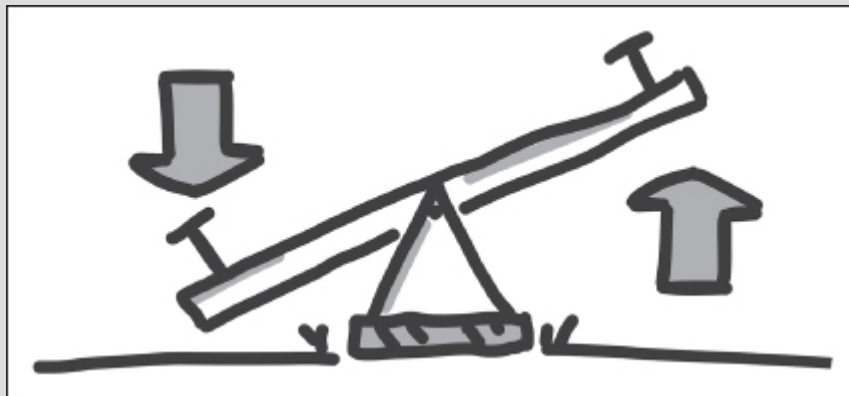
The same ruts hold for investors, according to chessmaster Robinson. In a Q&A he did for the Tim Ferriss Podcast, he expounds upon Slovic's study, taking some swipes at human nature in the process. If, for example, he sees certain investors touting the fact that it “makes no sense” that a particular sector, say, energy, is trading at increasingly lower prices, he often concludes that the sector has lower to go because those same investors are “probably doubling down on their original decision to buy energy stocks.” Eventually, as a result of their confidence in their own narrative, “they’ll be forced to throw in the towel and have to sell those energy stocks, driving prices still lower” (The Tim Ferris Show, 2018).

Robinson, importantly, is not saying that he can read the market or predict the future. He's simply stating that he himself prefers to bet on the fact that human reactions *to the world* are often based on their models *of the world*. Like some poker players, he prefers to play the people at the table rather than the cards in his hand. He prefers to watch where the people are likely to go wrong, and then work with that.

A Preoccupation of Seesaws

The overarching metaphor for this section is a seesaw. Yes, the dual-player game wherein a long board is placed over a central pivot point, allowing one player to go up while the other goes down, and vice versa. Come to think of it, it is not really a game. It is more of a preoccupation, wherein both parties concentrate on the action, engrossed for as long as it holds their attention. While the board is in motion, there is no end and no beginning. When one person decides to stop – sometimes by rudely jumping off and sending the other person plummeting toward the dirt – the preoccupation ends. For the game to continue, both players have to be mutually invested in the outcome – and each other.

We will not mention a seesaw explicitly until further on, but we hope this image might help you to make meaning as you read. We are borrowing this move from some of the best teachers we know, ones who create mental frameworks for their lessons, often through extended analogies, to help students collect, store, and recall information.



Add Yourself to the Situation

In a business relationship or transaction, we're likely to go wrong when we remove ourselves from situations that require our presence.

Allowing a robot to answer your phone might save you money, but it can also cost you customers if they begin to feel alienated and so

go looking for a company with a touch more like their own. Sending an email blast to hundreds (or thousands) of prospective customers for your software, even if it's personalized with their names in the salutation, may increase your yield of meetings, but it can also create a negative association with your name or company when you send your second or third touch point. Automatically scoring a check for understanding following a training on a new home insurance offering is easy to measure and convenient for sharing results, but it may certify too soon someone's readiness to use that training knowledge in the field.

While there may be reasons to automate certain transactions or business interactions, ineffective automation – or too much – reduces essential components of business relationships, making them inauthentic.

Authenticity, in an increasingly networked world, is an essential starting point for the ways in which we design our business interactions. And, admittedly, it's a bit squishy. Ask a neighbor, and she'll be likely to define it as “being yourself” or “a means by which you can establish trust.” Ask an academic, and you're likely to hear a long litany of words like “sincerity” and “irony,” along with their historical underpinnings. Ironically, if we're tracing authenticity's academic lineage, we'll find that it can be manufactured. We'll find that it can be fake. That, sincerely, it can be insincere.

For us, focused as we are on the interactions that drive sales, service, training, and leadership in companies large and small, authenticity happens for others when they know that a person – not a machine – is overseeing a transaction in which they are involved. A machine might help to move that transaction along; a machine might make that transaction more efficient; ultimately, though, in an authentic exchange, a human has oversight.

Bust Up Bias to Build Understanding

Robinson is not the only one who has the market cornered on watching where people are likely to go wrong. The best teachers do the same thing, and seeing it their way can help business professionals to cultivate deep and meaningful relationships.

The best teaching science suggests, as pro forma practice, uncovering flaws in learners' approach to material. It is one of the

reasons successful teachers prefer to ask questions, offering plenty of “wait time” before calling on someone, rather than simply lecturing students on a topic.

From a learning science point of view, if you want to help people or change their minds or inspire action in them, you first have to find ways to disrupt their misunderstandings or biases, especially, and most critically, when both seem to be right or when both seem to be, for the most part, working tolerably well.

Here is something counterintuitive. The truth of a discipline is important, but it is nearly impossible to bring students – or clients, colleagues, customers, or managers – to that truth if you are only pointing at it or, worse, pounding them over the head with it with an insistence that the truth is worth knowing. When you are trying to teach people something, and you really want them to understand it, remember this: you learned whatever you're teaching because it became personal for you or stirred up an interest and commitment. Others will only learn it from you if they can access a similar well of motivation – enough to help them sidestep and even overcome their own baked-in cognitive flaws.

To move a student toward the truth, then, as any good teacher will tell you, you have to be looking at the student, at the person in whom you are trying to build understanding. You cannot just reduce the person to a type; you have to be close to him or her. From educational literature, we recommend the analogy of peering “inside the black box” of understanding (Black & Wiliam, 1998). You need access to the box in order to figure out how to move people to knowledge, skills acquisition, or action.

For example, an effective math teacher knows that a student often has to overcome his or her own certainty. In mathematics, students have to learn to use valid procedures and to understand the concepts that underpin them. Difficulties can arise when students learn strategies that apply only in limited contexts and do not realize that they are inadequate elsewhere.

As such, a skillful teacher relies on one of the oldest technologies known to humankind: the artful question.

Questioning must then be designed to bring out these strategies for discussion and to explore problems in understanding the concepts so that students can grasp the need to change their thinking. (Black, Harrison, Lee, Marshall, & Wiliam, 2004)

Questions help effective math teachers to create space, or intellectual legroom, for a successful learning transaction. Walk across the hall to a science classroom, and you'll see something similar:

There are many features of the natural world for which science provides a “correct” model or explanation. However, outside school, many students acquire different ideas. For example, some students come to believe that animals are living because they move but that trees and flowers are not because they don't. (Black et al., 2004)

In addition to the line of questioning described above, good teachers use two other simple human innovations to break down misconceptions. First, they aim to anticipate “alternative conceptions,” especially ones that have been well documented. Second, they exhibit restraint in working with understanding, which can be delicate:

[More] presentation of the “correct” view has been shown to be ineffective. The task in such cases is to open up discussion of such ideas and then provide feedback that challenges them by introducing new pieces of evidence and argument that support the scientific model. (Black et al., 2004)

Consider a challenge you are likely to face. Perhaps you are stuck in a business transaction wherein you've identified a solution but cannot convince your client or customer to take a step that you feel is in his own best interest. Or, perhaps you've identified a necessary solution during a service visit and you simply cannot convince the customer to act, again in her own best interest. You are stuck – because someone in whom you are trying to build understanding is stuck.

If you want to lead people to the truth, you have some options. Repeatedly telling them the truth, even in an impassioned way, is not as effective as approaching them with a teaching mindset. That is:

- Seeking to understand the broader landscape in which they operate and the other challenges or considerations of importance on their end.
- Analyzing their understanding.
- Noticing any possible misconceptions that might be clouding their judgment.
- Talking with them and asking them questions.
- Meeting them where they are.
- Slowly rebuilding their understanding by giving them targeted feedback and the right information at the right time.

August Van Eepoel, a tax lawyer who has also taught in a variety of settings for several decades, puts it this way:

As to teaching, I soon discovered that covering the material did not produce visible results or participation by the students in a class discussion. I learned to bring a simple, real-life case to the class, but a case at the lowest level for comprehension by all the students. Thereafter, once discussion began, I could change the case to add complicating facts and allow the discussion to be guided by me to a higher step in comprehension...and then another step. Then, I would discuss with the students one or more possible solutions. (Personal statement, 2018)

Interestingly, he sees a direct through-line to his work with clients:

Transferring this teaching experience to the business conference room, I learned first to listen to the client, not only to understand his/her concerns and the desired goal(s), but also to gauge his/her knowledge of the legal matter in general, as well as the issues of importance. Using the same classroom process of a step-by-step discussion, informed by my client's understanding, I could then layer in a number of other issues to consider, one-by-one, to develop a plan or strategy that I would present at the conclusion of the conference. (Personal statement, 2018)

You've heard about the difficulty of making a horse drink once you've led it to water. As Van Eepoel suggests, as the horse handicappers proved earlier in this chapter, and as all good teachers know, the horse is often operating from a flawed

understanding of the water (i.e., discipline) with which to begin. Any educator would bet that if the horse understood the water and its benefits, it would not only drink the water but also find its own way there, with or without assistance.

Win-Win-Win

If the horse ultimately does drink the water, the horse benefits by being properly hydrated, but the trainer benefits, too, because his or her horse has a chance of performing better. A good horse and a good trainer benefit the context in which both exist, whether that's competitive jumping, racing, or training young riders. We're used to hearing about win-win scenarios, but this is something different. This is win-win-win. A win-win-win scenario begins, often enough, with assessment, which is essential to all learning experiences.

When you look up the etymology of the word “assessment,” you may find that it is derived from *assidere*, which is in turn derived from *ad sedere*, which in Latin means “to sit near.” The context of “sitting near,” it seems, was that a judge would sit near a citizen to determine the value of a property, business, and so on. The word's meaning evolved from the idea of “sitting near” in order to build understanding. The value judgment that arrived as a result of the proximity was folded into the broader and current definition of “assessment.” Today, assessment, at least in education, is often thought about in terms of evaluation or measurement of learning – but the closeness or context in which the learning takes place is often, and unfortunately, left out of the thinking.

In schools and businesses, an individual's performance is usually measured under some formal assessment or evaluation instrument. Humans, generally speaking, operate comfortably and effectively when they understand the boundaries and expectations in a given situation or set them, collaboratively, in advance. The authority in the situation (a teacher, one's boss, a salesperson) can help both determine the boundaries or expectations and then assess or evaluate an actor's performance within them, amplifying both sides of the experience.

Tip

For sellers: In a sales motion, when the customer buys what the seller is selling, the customer should be improved in some way, the seller should earn credit for closing the deal, and the context, in which seller and customer exist, should be enhanced due to the positive benefits delivered to two of its members.

For service professionals: In a customer/client support transaction, the customer's or client's issue should be understood (assessed), the service professional should move toward a solution (acting on the assessment), and the context they share should be enhanced. The customer's or client's problem is resolved and he or she will be loyal to the business, as she now views the service professional as a trusted advisor.

Think back to a spelling test when you were in elementary school. The authority (the teacher) probably gave you a list on Monday of words you needed to memorize by Friday. When Friday came, the teacher probably instructed you to pull out a piece of paper. He or she would then say each word, one-by-one (and not necessarily in the order of the original list), with the expectation that you would listen, recall the correct spelling of the word, and write it on the paper. At the end, you would turn in your paper, and maybe the next Monday, you would get it back with an indication of how many words you spelled correctly and how many words you spelled incorrectly. For the incorrect ones, the teacher might indicate the correct spelling.

Merits of this kind of exercise for today's modern, Google-fluent learner and worker aside, the process itself is completely acceptable. The assessment – the building of mutual understanding of where the individual is within the offered boundaries and expectations and what needs to be done next to operate better within those same boundaries – is sound. If the teacher enters the score into a grade book, and the exercise is done weekly, and so on, even that is acceptable.

But the authority, who has access to that information not only for the one individual, but also for the class as a whole, is able to do

much more for the individual, and this is where both educators and businesspeople should take note.

By either detecting patterns in an individual's progress or noticing a trend across the class, effective teachers can elevate the experience of the taught, and in so doing, the experience of the teaching itself (a core tenant of all great teachers is that they want their students to succeed). If all those students do better, the school does better. And not to put too idealistic a gloss on it, but society does better, too, when its students and teachers succeed. Maybe if everyone misspelled the same word (or type of word), the problem isn't with the individuals, but rather with the way in which the concept was taught. A good teacher would not let himself or herself off the hook in this moment. Even something as simple as a weekly spelling quiz would lead a more progressive (better) formative assessor to gear future exercises toward helping both the authority and the actor improve within the context.

The problem is true assessment of learning and progress is very difficult to scale, because only humans are really good at it. Computers might be good at aggregating data, finding correlations and causality that are too difficult for a human being to notice, but that information is best used by a human, who can then apply judgment and intuition – and other immeasurable dimensions – as a lever for someone else's learning. What's more, the human can buy more time and room for humans to reach a mastery that will transform them.

If you're adopting a teacher's mindset, the challenge is to be this good – to assess this well.

Tip

For sellers: The challenge is to use the data and history you have about a customer to inform your next call – not simply to decide whether to have a next call at all.

For service professionals: Use your templates and decision trees as a framework for getting to a resolution, but have a separate tree that helps you to navigate the emotions – the contexts – of the customer. These human dimensions are just as important as the right steps for a solution, and handled well, they can bind that customer or client to your company and its offerings.

For leaders and managers: Don't confuse objectivity with fairness. Leadership – and human development – is highly subjective. Equal attention and effort does not mean identical paths.

2

Recovering Human Judgment

If you've ever been frustrated enough to place a service call, you know that the call can either add to your frustration or reduce it. The call can either make you feel confident that the service professional has resolved your issue or armed you to handle it, or it can alienate you from the company, product, or service.

Often, such calls are routed through a computer or robot that handles each customer or client in the exact same manner. That routing process can be positive or negative, depending on the way in which the service architecture is structured. Should a human ultimately join the process, this can either enhance or diminish the experience.

Should a human become part of the process, as clichéd as it may sound, that individual should be prepared and able to judge when it is appropriate to teach the customer or client how to fish instead of just giving him or her a fish.

In thinking about a seller – or leader – or trainer – or support professional (as in the example) – the human does not need to have all the information at immediate recall; instead, he or she has to help another human move onto a path to be able to successfully navigate the information (and the path).

We interviewed Owen Jennings, product manager at Cash App, to gain some deeper insight into the ways in which service calls, in particular, flourish or fail based on the extent to which they are authentic, or the extent to which the transaction is overseen well by a human agent.

The biggest issue that you face when you run a support team is do you choose to solve the problem through technology or through people. “People” is much more expensive than technology. So, you could have a phone tree set-up, meaning that a human never interacts with any customer and customers just press through the buttons and the case is resolved that way.

But that can feel terrible and doesn't always resolve the case and customers can get angry and then take to social media to express their views.

So the flipside is [to run a giant] call center with a big enough team that someone can always answer the phone in a timely manner for all the customers who have questions. This will lead to high customer satisfaction...at a high cost.

Ultimately, then, it pays to think about how you combine those two scenarios. How do you offer a great experience in a cost-effective way? One of the things that we did when I was working at Square Register is callbacks. So there's a quick interaction with technology and then there's a genuine interaction with a human.

For us, it looks like this: If a customer writes into support, they get a text message or an email that asks, “When do you want to schedule the call?” Let's say they say, “4:00.” That's all automated. There's no human involved, and it's very, very cheap. Then at 4:00, a human calls them. And that experience is in the middle in terms of how cost effective it is, but way better from the customer perspective. (Personal statement, 2018)

Ultimately, Jennings' analysis points to a key insight, easy to overlook, for anyone considering efficiency and cost savings against the satisfaction of their customers, clients, or teams: “When you're interacting with a company, it's often a matter of what feels good versus what doesn't.” Establishing the conditions for authentic transactions, wherein customers, clients, and team members feel cared for throughout a process that may be difficult or stressful for them, is not an exact science. It can be expensive. But your success rate can be improved if you approach situations with a teacher's mindset. Without wielding a large budget or a team, a teacher succeeds by staying focused on his or her students.

A teacher succeeds, in fact, by studying his or her students continuously to ensure that the class serves their needs and helps them to reach their goals.

Pause for a moment and identify your equivalent. Who, precisely, is your student? Who are you trying to teach? For whose understanding are you responsible? Envision this person or these people clearly before reading ahead. (Have some fun and activate your focus even more by drawing a quick sketch of him or her.)

Tip

For trainers: A move all good teachers make is to create pauses in the middle of their classes in order to allow students to synthesize, and ultimately make meaning of, what they are learning. If your instruction feels, to your learners, like a firehose blast, many of the key points will simply bounce off them as they hunker down and try to survive the onslaught.

For managers: If you have called a meeting, and that meeting is just a 45-minute listening session (with no pauses), your audience might take on a defensive, disengaged posture. However, if your instruction – your presentation, your sales pitch, your explanation of a solution – provides a mix of discussion, feedback, presentation, more discussion, check-ins, and time, it has a chance of sticking. Even more so if you include some images in support of your points.

Slow Down to Make Room for Learning

If your business is at all based on relationships, near-constant interactions, or information transfers – and few, if any businesses, are not – you should ensure that speed and efficiency, some of the very things that computers can do best, don't degrade bidirectional understanding in your key relationships.

We'll touch upon this more in our next chapter, but essentially, you should always protect the manner in which you seek to build, activate, and confirm precise understandings with your clients, colleagues, managers, direct reports, and any other constituent we've missed. We call this the “understanding-enhancing step,”

and skipping it is the organizational equivalent of skipping breakfast.

Sometimes, as we now know, building understanding means uncovering false understandings first, so as to rebuild that understanding and to then approach firmer ground. Often, that means working like a patient teacher. And increasingly, that will mean disrupting the algorithms or technologies that have been assembled between us, ironically, to serve us.

We read this recently: “A majority of new jobs will not be strictly technical in nature but rather will focus on ensuring smart and responsible use of AI [artificial intelligence], the training, explaining, and sustaining of the algorithms. Such jobs will require basic understanding of the new technology but also human judgment and empathy to both guide it and explain it to those it affects” (Murray, 2018).

Here's what “training, explaining, and sustaining” might look like in the hands of a great teacher.

Enterprising students have been using online resources like Khan Academy since its inception to help them plug gaps in their understanding or move through curriculum more quickly. It has also attracted a mix of teachers. Some of them use Khan Academy as a replacement for actual teaching. They post the links somewhere online or simply direct students to the site with instructions about what to look at or find.

Others use this resource according to the “training, explaining, and sustaining” model mentioned above. They don't just post or share links without context. This would be the educational equivalent of bad automation. Instead, a teacher might personalize the exchange – the teaching – by embedding a link in an email to a particular student, at a particular time in his learning journey, and saying something like: “Hey, I know I explained that one way, but based on how you learn, here's another version that might make sense to you.”

Or, the teacher might watch the video alongside the student and talk about how the Khan Academy approach is similar to, or different from, the way he or she taught it. Comparing and contrasting is one more research-based (and outstanding) teaching methods used by good teachers (Marzano, Pickering, & Pollock, 2001). Such small, human touches can be very effective in

teaching the eager, anxious, or struggling learner, rather than simply forwarding a link or placing a link on a website for all the students in the class to access.

Think about a time when you have just forwarded a link or posted a resource – something that you stumbled upon and found interesting or that your leaders are expecting you to share with your respective audiences (e.g., customers, clients, or team members). The lazy move is to just send the link and hope that some percentage of the audience investigates it, and that a smaller percentage is able to do something meaningful with it. The less-lazy move might be to layer on some expectations. The winning move, however, is to correctly frame “why” the resource is important, comparing and contrasting how, without that resource having been explored and considered, the service, client, or customer relationship will be worse off.

Tip

For all readers: The idea that your generic collateral not only can be personalized but also should be personalized, is not often where people begin in leadership or business. They do not realize, either, that such personalization takes very little effort – but could mean a huge difference to a customer, client, or teammate. If nothing else, it shows them that a human being is overseeing their experience.

The winning move points to the slowing down of a transaction, and if anything, we want to encourage such slowness and patience. We want to encourage throwing a spanner, as the expression goes, in order to welcome back into the fold human judgment, educational practice, the art and science of treating the people across from you as if they are capable of learning. If you can encourage others to become learners – a natural thing for most of us – then you can use the resulting understanding to help them make the best possible decision for their goals and situation.

In short, show up in person when the time is right, and be authentic in the way you engineer experiences for others.

3

Recovering Choice in Human Interactions

So what are we slowing down, and why?

It's six in the morning and you're calling your hotel in a panic because you will be arriving at a different time and you need to make a quick adjustment to your family's itinerary. What voice do you hope shows up on the other end? What voice do you dread?

You're on the phone with your bank looking for a loan. You've been a member of the bank for 15 years. Do you expect someone to know you, based on your history with that bank, or do you expect to feel like a total stranger? Regardless of their final decision, if they treat you like a percentage or a set of numbers, how will you feel? If they treat you like a human being, how will you feel?

You're applying for a job that you feel is the perfect job for you. Furthermore, you're an outstanding fit for the company. But before you can prove yourself, or the company can understand your value, your resume has to rise through the murk of an algorithm searching for certain keywords. Do you make it through? Can the algorithm actually see you? If you change your resume to try to game the system, is the resume really going to reflect the unique parts of you that would make you a compelling prospect for the job in the first place?

Now switch roles. Imagine that you're the one servicing the above transactions. How can you help the frantic 6 a.m. caller about to jump on a plane with a two- and three-year-old, not sure where he's staying that night? How can you demonstrate that you actually know the person looking for the loan, so that you can say “yes” with her best interest in mind and say “no” with empathy and understanding? How can you ensure that your resume algorithm doesn't filter out the best possible candidates?

We suggest that you begin with the implicit questions being posed by the “customer” in all the scenarios (and many more that we

didn't list): “Is this authentic? Is there a genuinely caring human being behind what is being presented?”

Admittedly, not all businesspeople are prone to ask this question when they're seeing (i.e., salivating over) automation possibilities. The person seeking a hotel can be routed through a robot assistant, and his problem can certainly be solved that way, documented, and considered done. What's more, dozens of these calls can be processed at the exact same time. The decision for the person seeking a loan can be quickly calculated by running a risk assessment calculation based on that person's prior history. A simple yes or no can then be delivered, allowing the bank to put its capital in the best possible places. And the resume filter may not find the left-field, game-changing candidate, but it will certainly surface many solid, viable, and safe options. Automating tasks can definitely increase various bottom lines and allow your company to scale.

But pushed too far, such efficiencies, such hacks, such conveniences can lead you to abandon what humans are inherently good at, which is nonroutine behaviors and tasks plus context. If you comfort that 6 a.m. caller while solving his problem (exacerbated by the early hour at which it is happening), counsel that bank loan applicant with a dose of wisdom, warmth, and experience (enhanced by the difference in life experience between him and you), and find that left-field job applicant (despite the unconventional, quirky path he has taken in his career), you'll be helping the customer, helping your company, and adding meaning to your own job.

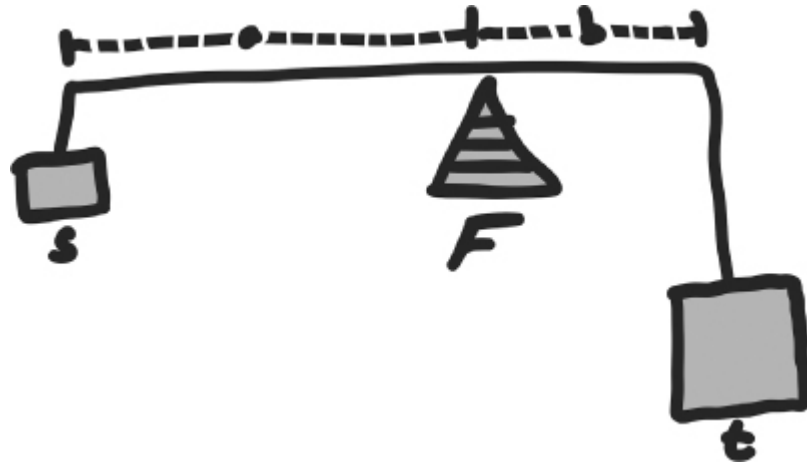
Like we've seen hundreds of times in our classrooms and in classrooms we've observed: humans naturally prefer to interact with other humans, and technology works best when it serves as a way for humans to generate closeness, to connect.

Move As the Line Moves

Move as the line moves – a formula for happiness and success? Not quite. But it won't hurt to think about what computers are good at and what humans are good at, make peace with the fact that the line in the sand will constantly shift in the years to come, and then work to make sure that the human part of yourself, your team, your company, even your family, shows up – by default –

when it's going to make a difference for a relationship or transaction.

Both the people thinking about the future of work and the companies defining the present (and future) of work see and frame this line – computers are good at this, humans are good at that – clearly.



In a recent report, the Pew Research Center's Internet and American Life Project pulled together a wide range of experts – including professors from all over the world and a principal researcher from Microsoft – to offer some claims about crucial (human) skills of the future and the way they will shape the future of work. It wasn't surprising that they suggested that we should all seek to “[nurture] unique human skills that artificial intelligence (AI) and machines seem unable to replicate.” There's a time for John Henry to put down his hammer, allow the steam-powered drill to do his job for him, and exercise his talents elsewhere, perhaps for some higher or more complex cause (Rainnie & Anderson, 2017).

But, according to the article, there's also a time for John Henry and his hammer to work *with* the steam-powered engine.

So they're not suggesting that we find ways to suppress or better AI and its robot spawn; they're suggesting that we learn to call these entities colleagues – that we learn to “work successfully alongside AI.” And yes, when pressed, they're encouraging humans to continue to excel in the squishy stuff – how to play well with others, how to communicate when situations are complex, how to deal with environments that can't necessarily be predicted, and what (in schools) is called “social and emotional intelligence.”

Amazon's Mechanical Turk (MTurk) program offers a fascinating inversion of their theorizing. While the above thinkers know that humans, at their limits, need computers – and so propose ways to work with them – Amazon posits that computers, at their limits, need people.

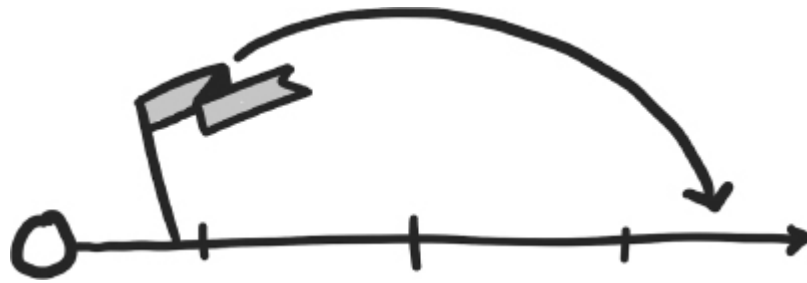
People, as such, have two ways to plug into the MTurk program. First, they can “request” the completion of tasks that are mundane and repetitive and outside the bounds of what computers are currently good at. Amazon's MTurk website calls this “human intelligence” and lists possible uses for said intelligence as “identifying objects in a photo or video, performing data deduplication, transcribing audio recordings, or researching data details (2018).”

The inversion is truly (almost) weird, centered as it is around streamlining the access to, and use of, a human workforce (to “make accessing human intelligence simple, scalable, and cost-effective”). But as we said, we're not here to judge. Just describe. If we're betting, we're betting on the reaction to the trend, not the trend. We're betting that the people with whom we interact in our various business functions are constantly scanning for a certain kind of attention, a certain kind of judgment and warmth.

And we're betting, therefore, on the fact that the constant negotiation of humans and technology is as crucial for business and life as it has been for our time in education. It makes sense, really. We have learned to work seamlessly with calendars and spreadsheets and calculators and phones and cars. We can absorb more possibilities. After all, we're not machines.

Tip

For all readers: Here we offer a chance to skip ahead to the end of this chapter. If you feel like reading more about the relationship between computers and people, let's dig in. If not, we suggest that you skip ahead (look for the prompt shown below). Offering this option is a teaching technique that considers the pace of individual learners, the segmenting of information, and the introduction of choice. Whether you exercise the option or not, if its underpinning appeals to you, consider how you might use a similar option in your own work with clients, customers, or teammates.



Grow the Potatoes

In his work at MIT, Dr. Justin Reich explores the relationship between computers and people. Pointing to the groundbreaking work of Levy and Murnane (2004), he describes the lens of comparative advantage as being helpful for considering what computers are good at and what people are good at.

For example, if you are not the best at making butter, you should let somebody else make butter and buy it from the people who are the best at making butter because you are the best at growing potatoes. You get optimal trade if everyone does what they have a comparative advantage in. That does not mean you have to be the absolute best; you might be better at making butter than somebody else, but you still might make potatoes because that's where your comparative advantage is. (Personal statement, 2018)

Levy and Murnane came to the conclusion that the computer's comparative advantage was in routine work, and humans' comparative advantage was in nonroutine work. Two main

categories of nonroutine work where humans seem to have a comparative advantage emerged: “ill-structured problem-solving” or expert thinking and “complex communication.”

Ill-structured problems are ones where you don't know what data you need going in, you don't know what the solution will look like on the other side, and you don't know how to solve the problem. Computers will not be as good at these kinds of problems as humans are.

Complex communication is when you need elements like empathy, persuasion, and so on, to achieve understanding. Computers can carry on routine, structured conversations with people, but if you need to understand how to do a task by talking with someone else, you probably need a human to do it.

When you're able to automate certain things, it creates that time to be able to do those nonroutine tasks even better. The easiest way to see and understand this is to think about the coaching career of our friend, Tony Jones.

Tony is both a teacher and a coach, which means that the roles blend together for him. He can often be found talking to his biology students about motivation and growth – as if he were on a basketball court – and, just the same, he approaches his players frequently as if he were trying to teach them, in a classroom. Over his career he has used his teaching skills, in particular, to present game film to his players. These moments allow his players to reflect on their actions and also learn some of the mental or strategic sides of the game.

Early in his career, Tony had to “cut” the film himself. He spent hours upon hours reviewing game film and isolating the teachable moments.

More recently, Tony has partnered with a game film company, which does editing work for him. He can ask the company to splice together any number of things: all the times his team scored, all the times the other team scored, all the times his team lost a rebound, all the times his team turned over the ball, and so on.

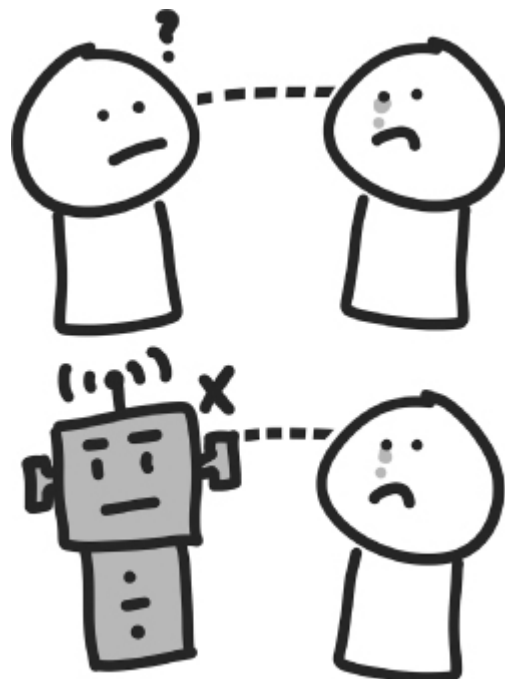
Tony was pretty good at “making butter,” or editing, but he is not the best. The film company is the best. Tony is best at “growing potatoes,” that is, helping young players to understand the game of basketball and build the right kinds of commitments on and off the court. Being able to access precise, actionable game films

allows him to have the kinds of conversations, and seize the kinds of teachable moments, that make him a high-level teaching-coach. Having a good chunk of his time back allows him to think about his players, have more individual meetings with them, and grow even more potatoes.

Stories like that one, where automation of one task allows for a deeper commitment to nonroutine tasks, resonates with people. We all want to be in the position to use more of our gifts and talents.

Computers are good at routine tasks like calculations and processing loads of data and generating multivariate projects. They are good at housing information and pulling it up instantly. They are good at procedures and causality. Some people are good at these things too, but not nearly as good or consistent as a machine.

People are good at nonroutine tasks, like understanding context and tone or interpreting human signals and the absence of them. Will a computer ever ask itself the question, “Why is that child crying?” At the present time (2019) only a human can understand – or begin to want to care about – that particular sound, that particular child, without needing to follow any set procedures (Senge & Reich, 2017).



On the flip side, we also believe that people are building a capacity to recognize the intrusion of the nonhuman in everyday life. They

are building, in short, a capacity to recognize whether something was generated by a computer or by a human (and if not the capacity, then perhaps the instinct to even question it). In his talks, Reshan often refers to a *New York Times* article about poetry that challenges readers to determine if the words presented were written by a human or generated by a computer. He continues to use the resource, as we will again below, because of the level of interest from audiences, along with their reactions when they learn the answer. It's not something people think they would care about – until they are made slightly uncertain about their ability to recognize their own humanity.

Tip

For all readers: Do an online search for “Did a Human or Computer Write This?” and look for the article from the *New York Times* dated 2015. How did you do on the assessment? How do you feel about your results or even the fact that we now have to ask these kinds of questions?

In the age of emerging computing and technological powers, how do we ensure that we allow people to fill the “human” roles, and assign machines to do what they are best at doing. There's no simple fix. No hack.

To move forward, though, we can look back, to one of the influential business minds of the twentieth century.

In an interview with Bob Buford, Peter Drucker identified the first role of a leader or manager as “the personal one.” Then he expanded his thoughts in a manner that is increasingly relevant to the world we inhabit in the twenty-first century and the discussion we are currently having:

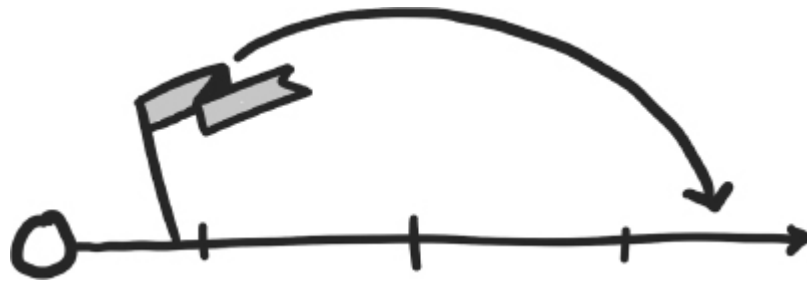
It is the relationship with people, the development of mutual confidence, the identification of people, the creation of a community. This is something only you can do...It cannot be measured or easily defined. But it is not only a key function. It is one only you can perform. (Drucker, 2013)

When in doubt, and regardless of the role you are currently serving, the authentic move is the right move – the move that helps you focus on the human need in front of you. That's the

nonroutine task, and to make it anything different, to make it routine without recognizing the consequences, is a sacrifice of the “thing that only you can do.”

The other thing that only you can do, as a human being, if we can dare to build off Drucker's words, is to maintain a constant, floating awareness of the options in front of you. When is a task routine? When is a task nonroutine? When does a human transaction need human input? When can a human transaction be made more swift or efficient so as to free up the humans to do other, richer, more effective tasks? When is a problem structured? When is it ill-structured?

Maintaining this floating awareness will sometimes mean evaluating the choices others are making for you – do you want to continue to be tied to them? – and sometimes it will mean being rigorous in your evaluation of the choices that you – and your business – are making for others.



4

Adjusting to Hear and Be Heard

Helping others to choose well in a business setting often involves education. But the education, for it to stick, has to be centered on the needs of the particular learner (i.e., client, customer, direct report, or manager).

The best teachers are never the ones looking for canned lesson plans borrowed quickly from a colleague or ripped off a website, and the same can be said for the best business people, who would never want to be accused of offering canned advice or guidance. Though teachers speak often about “not reinventing the wheel,” the best teachers never adopt an old wheel if it means that they have to give up their ability to make choices, in the moment, about the learners in front of them.

They are masters of human-centered optionality, which is a fancy way of saying that they have methods for keeping their eyes on the learners in front of them and then choosing instructional options from a vast toolkit to bring each learner one step closer to the ultimate goals of the class itself. They do what their classes (and schools) promise to do, and they take great pride in that fact. It's a responsibility that comes with a great, internal reward when fulfilled.

They might stop a discussion that isn't going anywhere, or that seems to be alienating parts of the class, and ask students to silently journal and then pass their journals to the right. They might call for a debate...and then switch the sides at the last moment so that students have to drop their dug-in viewpoints and adopt the other side. They might insist that students ask questions instead of making statements. They don't always know what they're going to do in advance – they're not overcommitted to any particular path.

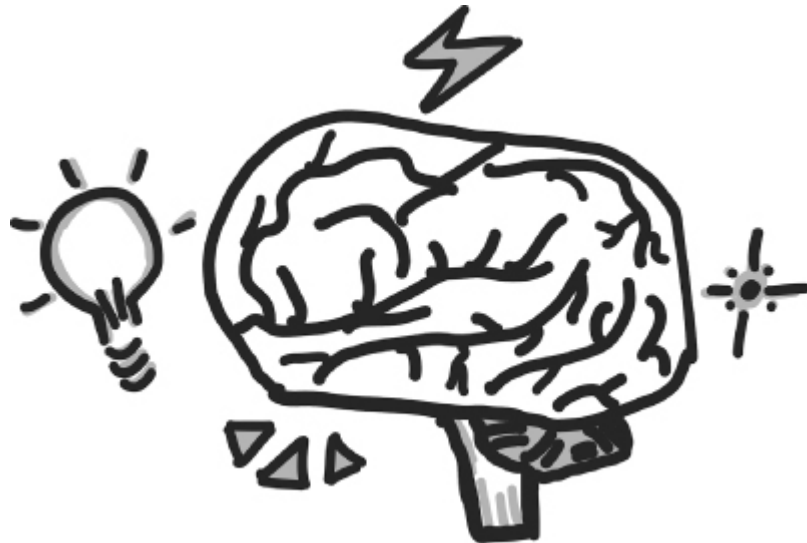
What they're committed to, intensely, is the art of constant adjustment. They make constant adjustments, on behalf of the learners in their care, based on information from the environment, the class, and each student. This is why, when a good teacher is asked how she can teach the same book for a decade or longer,

she'll often say, it's never the same book because it's never the same class.

Close the Communication Loop

Earlier, we talked about breaking into misunderstandings – the black box of the learner's mind. You also have to break into understandings, in part, because there's a lot going on inside human beings at any particular time.

This isn't just the case with young people. Though the adult brain may not be as pliable as the child's or teen's brain, it is pliable nonetheless. As all teachers know, it's a nuanced and tricky environment within which to do business of any kind.



Mostly, when we tell people things in a business setting, we expect them to hear us, process and store the information appropriately, and then respond to or act on the information in a way that will please us and advance our conversation, process, project, and so on.

But researchers Eleanor Drago-Severson and Jessica Blum-DeStefano remind us that communication is neither convenient, nor easy, even if we want to fool ourselves – or are good at fooling ourselves – into believing it is so. We, the communicators, play a huge role in the extent to which our communication lands (Drago-Severson & Blum-DeStefano, 2016). The “me” on the receiving end of the communication needs to be “told” in a certain way for the message to be “heard” or received. The communicator, therefore,

if he doesn't just want his message to skip off the surface of his audience, has to understand what's happening inside his audience.

We discussed this communication imperative with an expert on digital culture working for the Vatican at the time of this book's writing. He shared his perspectives as a former classroom teacher who had become responsible for communications and audiences at a truly global scale. He urged us – and others – to take responsibility not only for the transmission of messages, but also for the extent to which those messages were received. Good teaching, he would say, must be apparent in the students themselves. As such, good teaching can often be reduced to interacting with students in order to understand what they understood, offer correction if need be, and to continually assess what is working or not working in the teaching space.

Communication is a cycle. A good teacher ensures that the cycle is complete.

Deliver Your Message

Adults see the world through a variety of lenses. As information comes to them, they are constantly evaluating it against certain priorities that live deep inside them, perhaps unknown to them. If you give adults feedback and don't take those shifting sands into account, you are wasting the feedback.

The same holds true if you're making choices for adults about how they will experience a process or transaction, how a service agent will interact with them, how you will greet them at the door, or how you will create the text-based architecture that will process their communication (Drago-Severson & Blum-DeStefano, 2016). It helps to be at least a little bit of a constructivist, and therefore someone who recognizes that “people actively interpret – or construct – their experiences throughout their lives, and that these constructions largely dictate their realities” (p. 37).

Use the table in the following box to think about the people with whom you communicate most urgently. These are the people you most need to receive, process, and understand your communication; the people to whom you are seeking to demonstrate authenticity; the people whose understanding – of an issue, concept, solution, sale, initiative, or new skill – will help you to reach your own goals. As you identify their “meaning-making”

style, think about how you could shift your communication style in order to ensure that you are taking responsibility, in the words of our friend from the Vatican, “not just for what you’re saying but much more for what the other person is understanding.”

Drago-Severson and Blum-DeStefano's Four Different Meaning-Making Systems

Ways of Knowing

Instrumental	“Orients to and is run by one's own self-interests, purposes, and concrete needs” (p. 43)
Socializing	“Orients to valued others' (external authorities' or loved ones') or society's expectations, values, and opinions about the self and one's work and thinking” (p. 43)
Self-authoring	“Orients to self's values (internal authority) and the smooth running of one's own internal system” (p. 44)
Self-transforming	“Orients to multiple self-systems; open to learning from other people; wants to grow and improve different aspects of self; engages constantly in process of discernment about self” (p. 44)

Source: Adapted from Eleanor Drago-Severson, *Leading Adult Learning: Supporting Adult Development in Our Schools* (Thousand Oaks, CA: Corwin/Sage Publications and the National Staff Development Council, 2009).

Seek Full Enrollment

Some systems are set up to segment clients and customers and to solve problems following a one-size-fits-most logic. Others are front-loaded to treat clients and customers like learners entering a classroom with a caring and effective instructor who seeks to build understanding in students (i.e., clients and customers) early and often, to try to head off problems and misunderstandings before they derail ultimate understanding, and to create abundance.

This abundance fuels ongoing feedback, input, lasting engagement, productivity, joy, investment, and full enrollment. Your clients and customers keep showing up because they want to, not because they have to. They become fans, with all the loyalty that implies.

The quest for full enrollment can inform and guide how we organize our work, our teams, our families...to do the things we want to do. Yes, it can cost you something in terms of speed and efficiency. It can mean embracing the messy side of human interactions (i.e., being authentic) instead of lopping it off and pretending it doesn't exist. But let's not forget that efficiency and speed have their costs, too.

There are dozens of wonderful tech tools that leaders, sellers, service professionals, and trainers can use to inspire and guide their constituents. And it pays off to think with some specificity about your clients, colleagues, and customers as you're choosing the best ways to connect with them and to serve them. This example may be granular, but Steve still remembers the time he set up an auto-scheduler and people on his teams literally walked into his office and laughed at him. He suffered through that head-slap moment where he realized that he decided to use the auto-scheduler to help himself rather than the people he was responsible for leading/serving.

Most of us can't control the trends. They're going to wash over us. What we can control is our reaction to them. What we can do as leaders (and service professionals and salespeople and trainers) is to help others adapt and react. We can be present for, and awake to, what teachers call “teachable moments,” which are moments that you didn't plan for but that arose naturally from being with your students, from the circumstances surrounding your classroom. Like good teachers, we can look for opportunities instead of just speed, abundance instead of (only or mostly) efficiencies. We need to remain conscious...staying ever-vigilant with the relationships and transactions that matter most to the long-term success of our organizations and initiatives.

Calibrate for the Familiar

One of the best things a teacher can do to set the stage for meaningful learning is to personalize as much as possible his or

her exchanges with students. Personalization can happen when a teacher greets students by name as they enter the classroom, writes feedback that is genuine rather than generic, or even finds ways to record his or her voice when he or she has to hand off a class to a substitute.

In our estimation, based on years of observing classrooms and assessing learning, one simple reason for the effectiveness of the personalized approach is the simplest part of it: students thrive when they know that they are meeting the same caring adult each time they enter the classroom. They thrive when they feel that this adult knows them. They thrive when they recognize the voice, tone, mannerisms, and so on of the person trying to teach them. Familiarity, it turns out, lowers barriers to learning.

It's something you can't fake. It can only be built upon a certain level of trust, a certain level of showing that you have the best interests of the student in mind. It happens after small talk and big talk, after agreements and disagreements. It happens when a known entity interacts with other entities with whom he or she has taken the time to build a relationship.

Learning science might frame the above in terms of a mitigation of risk and threat, both of which are kryptonite to learning. Brain expert Eric Jensen puts it this way:

Threats [cause] the brain to trigger a sense of fear, mistrust, anxiety, or general helplessness. This state can be a result of physical harm or perceived danger (usually from teachers, parents, or peers), intellectual harm (usually from teachers, parents, or peers)...or emotional harm (embarrassment, humiliation, or isolation). (Jensen, 2008)

Once a student feels a threat, he or she loses all kinds of learning velcro. According to Jensen, students under threat have more difficulty using their brains for everything from picking up basic context clues in their environment to storing new information and then being able to access it when they need it. In short, threats reduce their ability to do both the simple and complex things that are necessary to thrive in an educational setting. It takes a caring teacher, one willing to connect meaningfully with each and every student in her care, to reduce threats that can derail learning (Jensen, 2008).

Throughout our interviews for this book, we noted a related and relevant trend in business right now: using video snippets to engage with others. For example, in sales, the easy thing to do in a follow-up to a prospect is to send a link to a generic video created by your company's marketing team. The more authentic thing would be to create your own video to send the customer so as to maintain the familiarity established during your last meeting.

In leadership, when you can't do a one-on-one check-in with every member of your team every week, you can send a quick, personalized video to him or her to preserve the continuity of touchpoints.

In training, it's easy to make one training video and then hope it will suit all learners. The more authentic thing to do would be to sacrifice polish for personalization, creating video content that demonstrates that you know your audience and the pain points in their learning.

In service, use the same move as a salesperson; that is, don't send a generic video when you can send something personalized as a follow-up.

Whether in school or at work, we seek control of situations and connection with the entity on the other end of the lesson or transaction. As a result, if we're on that other end – the teachers, the sellers, the leaders – we can accomplish a great deal when we align interactions and transactions around a familiar voice. That familiarity leads to an important, often unacknowledged, result: moving customers and clients into an authentic learning mode as often as possible. If they are learning, chances are they are primed to be responsive, primed to adjust as necessary, primed to partner with you or others, primed to solve problems, primed to do their best work.

5

Respecting the Game

As we forecasted in [Chapter 1](#), we now return to our opening analogy: the seesaw.

On a seesaw, you can't always control the ride. The power shifts back and forth, depending on when you're on the bottom, with your feet firmly on the ground. And if you're the kind of person who jumps off the seesaw when you're on the bottom, in that power seat, then it's very possible that, after a while, no one on the playground will want to be your seesaw partner. This is play, yes, but serious play. You burn your trust and you pay the price. Playground rules – forever.



Authenticity is about trust, too. Is there a person handling this transaction? Can that person be trusted? Or, if the transaction is somehow automated, does it feel supervised in some way by a human or does it feel like poetry written by a robot – a little bit off, a little hollow, missing an inner subjectivity?

Sometimes authenticity can be conveyed via an emoji. Sometimes, it requires a handshake. Many scenarios can engender productive, supportive win-win-win exchanges, so long as human intelligence is analyzing the context of the exchange and human warmth and intention are conveyed when need be.

We want our mortgage calculations done by a computer, not by Jack or Betty in the back office in the bank with his or her calculator. On the other hand, we want the initial information about our loan shared with us by a person, not a generic report. The latter situation, when we're getting ready to commit to a monthly payment that is beyond what we are used to paying

monthly for anything in our lives, is, in a word, terrifying. It requires steady analysis and nurturing compassion. It sometimes requires us to ask – or answer – the same question a few different ways. Sometimes, even, it just needs the simplicity of a “when I was in your shoes” story. As a good teacher knows, there are usually several paths through any lesson worth learning. And many, many more ways to educate someone for judgment, precision, and autonomy.

Good teachers – or sellers, leaders, trainers, or service professionals functioning as teachers – know how to grasp, and if need be, redirect the understanding of the people with whom they engage. They know how to communicate, bidirectionally, to ensure that student behaviors are shifting to lead to enhanced student outcomes. They know how to convey authenticity by understanding context, which is a critical part of our next chapter.

MAKE YOURSELF CLEAR WITH AUTHENTICITY

What good teachers already do ...

Good teachers work hard to understand where their students are, articulate where they want them to be, and think deeply about how to get them there. If that sounds easy, don't forget: you have to factor in that each student has a different collection of prior knowledge, prior experiences, and preferred modes of learning, depending on what is being learned. Also, each student can only become fully invested in his or her learning process, fully “enrolled,” if he or she encounters a sense of familiarity and trust in the classroom. Good teachers build the conditions for full enrollment. Once that is established, learning follows.

What a seller-as-teacher can do ...

Often, the seller is in the position of pitching, positioning, and/or persuading his or her audience to purchase a solution, service, or product. If the conversation leads off with something that is rehearsed, generic, and lacking anything to which the prospect can connect, it will not land. To enhance a sales conversation, a seller-as-teacher can employ active listening to the conversation before beginning the pitch. Ask a question (or series of questions) and make sure the person or people know you are listening and doing your best to understand.

Your nonverbal cues demonstrate attention (your gaze, your body language, your activity). If you are on a remote call, one easy way to demonstrate you are listening is to share your screen (or a link to a collaborative document or whiteboard) and allow the audience to see the notes you are taking. This provides the opportunity to reflect the message back to the customer and confirm understanding, and if necessary, to seek further details. Finally, as the information begins, even with a rehearsed frame, the teacher in you will more naturally connect and weave in what was just captured during the active listening (Weger, Castle, & Emmett, 2010; Spataro & Bloch, 2018).



What a trainer-as-teacher can do ...

If you are in a formal position of teaching within an organization – like a trainer or instructional leader or learning and development professional – the key to being more authentic is differentiated instruction. This practice recognizes that different people learn best in different ways, and their learning preferences may vary depending on the content. The most thoughtful trainers-as-teachers consider this when working with a group or an individual – how to present the concept or idea in a way that can connect to as many possible cognitive channels (auditory, visual, tactile, kinesthetic, etc.) individually or in a grouping (Hall, Strangman, & Meyer, 2003; Tomlinson, 2001; Watts-Taffe et al., 2012).

For every piece of content, and every learning activity, and every environment in which learning might take place, take into account and provide for different types of learning styles and channels: self-paced and instructor paced; text and image and video; visual and auditory; sitting at a workstation and being on the go. With all these options in mind, rethink your next learning intervention or initiative, and see if it has been designed and can be delivered to meet all those modes.



What a service professional—as-teacher can do ...

The goal for a service professional is to lead the customer or client not only to having his or her issue resolved, but also to understanding the nature of the issue so that he or she knows how to resolve the issue for him or herself, in the future. From an efficiency standpoint, many service professionals often follow a decision tree in order to get to the right possible solution the most times at scale. But when the client or customer provides information during the course of the interaction that allows skipping a step or jumping across to another decision tree, that adjustment is a type of formative – ongoing – assessment of the situation (Black & Wiliam, 1998). Following a script makes it easy to measure for success at scale over the course of a large volume of requests and a long period of time. However, you don't need a human to do that. When someone connects with another person – on phone or chat – it is up to that person to do what an automated system cannot. Where possible, he or she can add value by personalizing the experience.

Listen to the customer, confirm understanding, and then offer not only a solution, but also suggested steps for repeating the solution, or, even better, avoiding the problem altogether.



What a leader-as-teacher can do ...

Preassessment (sometimes referred to as diagnostic assessment) is engaging learners in an activity that lets the teacher know, to a certain degree, their prior knowledge and depth of understanding before diving into the planned instruction. A side effect is that even if the learners do not have much prior knowledge, the exercise primes their minds for what to expect (McTighe & O'Connor, 2003).

The best leaders-as-teachers respect the time and talents of their team members, and do not call them to meetings – subtracting chunks of their life out of a calendar – without having a sense of what people already know about the agenda topics. A simple questionnaire allows people to engage and consider topics in advance. Additionally, over time, seeing that preassessment data has been put to good use, team members will become intrinsically and authentically motivated to participate in the task because they will see the effort of completing it serving some larger purpose.

PART 2

IMMEDIACY

Think of it – to navigate by adjustment, by the beauty of adjustment. All those shifts and echoes.

– Jenny George*

NOTE

* Excerpt from Jenny George, “Threshold Gods” from *The Dream of Reason*. Originally published in *FIELD*. Copyright © 2018 by Jenny George. Reprinted with the permission of The Permissions Company, Inc., on behalf of Copper Canyon Press, www.coppercanyonpress.org.

6

Leveraging Momentum and Context

The format we have chosen to deliver this section's topic is fraught with irony. We are going to teach you about immediacy in one of the least immediate formats currently available: a book. To compensate, we will offer some format experiments to promote active learning as you read. A good teacher might refer to using devices such as note-taking templates or mind maps. Their goal in using such instruments is to make thinking visible. Having thought through where our lesson could go wrong for our learners, our goal is similar: to help you see and surface your thinking at the times when such a practice will, hopefully, be most valuable to you. With all of that off our chests, this somewhat winding road of a paragraph leads to our opening analogy.

There's a road on Bainbridge Island near Seattle, Washington, that is one of the most dangerous and exciting roads that we have ever seen. It essentially winds down toward the water and has room for one car, or to be more precise, about 96% of one car. As you are driving down it, you feel as though part of your car is hanging off the cliff. You are descending through steep curves, and it is beautiful when you catch a glimpse of the water, but...at some point, you realize that there are no one-way signs and that the narrow road is actually a regular, two-way road. Cars go down toward the houses at the bottom, and cars go up toward the bustle of commerce and entertainment or the ferry to Seattle, a center of even more commerce and entertainment.



Strict local laws govern the road. If you are driving to the homes below, bringing groceries, services, or good cheer, you must yield to those heading up the road. Yielding does not just mean stopping or pulling off, since there is nowhere to park your car. You have to drive backward up the hill, using your rearview mirror (and/or backup camera) to rewind yourself around curves until you find a shoulder or driveway on which to park.

The citizens of Bainbridge manage this whole thing with grace and even joy – it is part of life on the island – not a have-to but a get-to; not a hassle but a charming opportunity to solve the kinds of problems that happen when you build houses in the wake of glaciers.

This is the extended analogy for this section – driving on that unique road. We will return to it at the end, but you should use it for what it is: velcro for your learning. Let the ideas that follow stick to it, reflect off it, contradict it, amplify it, change it. This is how we make meaning; this is how we learn.

Interrupt Interruptions

Immediacy is the condition of modern life, the “new now,” that allows transactions big and small to happen when they are most meaningful and helpful (sometimes instantly, but not always). It occurs when both the actor and the audience deliver and receive what they need at the best time for their purposes (sometimes at the same time, but not always).

Looking at the ways it helps “individual contributors” or “producers” to add value to their organizations offers a good starting point for understanding its power – and why you would want to invest in it.

Tip

For all readers: It's worth isolating, before reading further, the aspect of your work for which you are uniquely responsible. We're not talking about routine tasks that could be completed by virtually anyone who has been trained. We're talking about those aspirational results of your work that happen when your particular skillset, historical knowledge, and personality are fully focused on an outcome.

Let's imagine a business trip to a conference and how immediacy might help an “individual contributor” to do the kind of work that only she can do – unique, creative, and tied to her personality, history, and perspective.

At 5 a.m., before heading to the airport, our traveler can launch a ridesharing app, which, after a few taps of her fingers, will most likely guess where she is going. There's no urgency for her to plan her ride in advance of the time when she is ready to use the car. Instead, she can begin thinking about the work she would like to accomplish during the trip: for example, as a speaker at the conference, representing her company, she might need to finish her slides, and she also might need to advance a time-sensitive project involving several different departments.

Worry-free when she enters the car, she can open her laptop or check her phone to begin completing the tasks required for her to advance her work.

On the plane, she can connect – again with full focus – to the Internet and pull what she needs from the cloud. She can review research or data, check in with important contacts, and see responses to questions she sent out the night before via email. All the while, her calendar, also connected to the Internet, can feed her reminders and tasks.

When she lands, she can use another app to figure out the best way to move from the airport to her hotel. She might take a few pictures to incorporate in her slides; she might read an article that gives her an idea for the project.

Arriving early at the hotel, she can ask for the concierge to send her a text when her room is ready. At lunch, she can begin to scan

various social media feeds related to the conference, helping her to connect with potential audience members in advance of her talk.

Walking back to the hotel, having been summoned by the concierge, she can dictate notes and thoughts into a transcription app, capturing any insights or conclusions she has developed along the way. She might send them out in a memo later; she might post them to a blog; she might type them into an agenda; she might send them, as notes, to her assistant or team.

There is no need to describe the rest of this imagined trip. Increasingly, many of us live and work like this, utterly connected and increasingly fluid as a result. But we do not often slow down to describe how we work like this...or to tease out the implications.

If you are focused on certain outcomes, as our hypothetical traveler was, you can leverage the immediacy available to you as you travel, as you work in your office or home, and even as you play. Producing genuine, original product – of thought, of thinking, in writing, on stage, in classrooms – basically requires such a shift. In our increasingly networked world, interruptions in momentum, or a failure of context to generate the right resources at the right time, erode excellence. Immediacy, properly channeled, heightens it.

In an interview with us several years ago, Jason Chicola, founder and CEO of [Rev.com](https://www.rev.com) (a platform that connects customers with freelancers who provide transcription services), explained some of the strategy behind Rev's approach and the reason that we still rabidly support the service to this day. Though they are incredibly focused on the user experience and the end product, they make gains in those areas by serving the people who serve their customers. According to Chicola, “We spend 90% of our time not with our customers, but with freelancers, trying to create a great place for them to work, which means first and foremost building tools and software to make them productive as they do the work. Rev is kind of like a black box to you, the customer. You put audio in and you get a transcript back. Behind the scenes, we build software to ensure the process; we build all the things for the freelancers to make their jobs rich, rewarding, and efficient. It's a two-way marketplace.” More on this in [Chapter 11](#).

Tip

For sellers: Consider when immediacy has helped you reach goals. What action were you able to complete – what information were you able to access and present to a customer – and what tools facilitated the process?

Adjust for Others

Our hypothetical traveler was aided by her level of focus, which was aided, in turn, by several shadow factors that were blended into the background of our narrative: that is, the leaders, salespeople, service professionals, and trainers with whom our traveler had come into contact.

The leader to whom she “reported” most likely helped her to establish clear priorities and offered her the freedom to deliver on those priorities in any way she saw fit. Like a good teacher, this leader had most likely been clear about an expected end point (in school, this is called “backward design”) and open about the path

an individual learner would take on her way to that end point (in school, this is called “differentiated instruction”).

The salespeople and service professionals that she met along the way – again, blended into the background of her story – also understood how to show up for her at the times that were most meaningful. They knew how to present, or work through, infrastructures and networks that allowed transactions to occur, for our hypothetical traveler, when they were most meaningful and helpful to her.

In classrooms, effective teachers adjust for the just-in-time needs of learners. In business, we can do the same for our clients, customers, and colleagues.

Tip

For leaders: Whenever possible, adjust for the momentum of others and aim to create contexts – work environments – that provide people with the resources and tools that they need at the precise time that they need them so that they can do the kind of work that only they can do. For individual meetings with direct reports, consider who schedules the meeting, when the agenda is sent, how the meeting is structured, and how the follow up takes place. Whose preferences and workflows are being served? At your next individual meeting, ask your direct report what he or she would prefer when it comes to the before-, during-, and after-meeting motions.

For trainers: Remember that learning does not always happen on a schedule. You can invite colleagues to a workshop or session and even qualify them for some kind of service or activity, but this does not mean that they truly understand the material. If you know enough about their workflow, you can help them to rehearse or extend their learning by sharing new resources at the specific moments when they might make use of them. Or, you can schedule quick follow-up discussions that double as reflective exercises. How have they made use of the new knowledge or skills? Where have they seen elements of the training show up in the workplace?

7

Generating Immediacy for Others

Recently, Steve was writing an agenda for a meeting with a leadership team. They were tired and a little grumpy. He was looking for an exercise, a question, a quote, that would stimulate a good discussion and remind his team about their core purpose, moving them closer to some energy reserves.

Steve did what he often does in these situations – when he is stuck and cannot access momentum, that is. He sought a fresh perspective, using a video-conferencing service to connect with someone outside his organization. Immediacy 101.

He texted Reshan to see if he was free and able to talk for a few minutes. Finding that he was, he set up a video chat with him. Zoom's platform made such connections easy; so easy, in fact, that on some weeks, Steve would speak to people on Zoom more frequently than he spoke to colleagues with whom he shared a physical wall. Steve simply had to send Reshan a link, and in turn, Reshan simply had to click on the link. Then, as if they had both walked into the same room, they were face-to-face and able to talk.



As the initiator of the conversation, and asking permission, Steve could record the conversation in case he needed to reference it later or transcribe part of it. And Steve was able to seamlessly share his screen to seek feedback on the work he had already completed.

After probing for context – Who are the leaders in the room? What are they hoping to accomplish in the next few weeks? What challenges are they facing? – Reshan suggested a question that would encourage Steve, and his team, to focus on...immediacy:

Thinking of yourself as a learner, a leader, some combination of both, or additionally as a participant in modern society, what do you need to have just-in-time (or at the right time) in order to operate effectively?

By widening the team's frame of reference, Reshan posited, they might be able to visualize their current struggles in a new way, from a new height, giving them some much-needed energy. This was the verbal equivalent of having them get up and walk around, find a new room or space, lay down some new velcro on which to stick stray observations and experiences (teaching, in short).

And it worked.

When Steve discussed the topic with his team, they perked up. Their answers showed a keen awareness of the importance of immediacy in their lives, both personal and professional. They expected most institutions with which they dealt to be highly responsive – and not just days or weeks later. Some of them mentioned Twitter, of course, and how they had seen people tweet both critiques and praise of everything from coffee shops to airlines to the colleges they were visiting with their children. Often, these short text bursts informed future choices made by members of the team.

They booked trips, even complicated family trips, much closer to the actual trips themselves. Deals popped up that way; reservations, even at exclusive restaurants, were often cancelled last minute and opened up last minute. And don't even get them started about the joys of shopping on the Internet rather than in physical locations. They bought what they needed, often more than they needed, and returned the excess or the unwanted almost as seamlessly.

And then Steve used one of his favorite teaching moves – he asked the group to reflect on how their excitement about immediacy in their personal lives could translate into their work as leaders.

Most of us in the room had come late to email – it started in college, graduate school, or our first job. And the joys of immediacy described above had happened for all of us at an even

more recent point of time, maybe only the previous few years or even months. What would it mean, Steve wondered aloud, for us to lead colleagues and learners who had never known a world in which they could not instantly connect to people, products, services – a giant digital brain? How should we lead a generation raised on immediacy? And how should we lead other generations, those not raised on immediacy but who have recently converted?

Pull on immediacy's dangling thread and you see that it unravels almost endlessly, spooling itself over much of modern life and its leadership. Here's a short list of items, adapted from the above conversation and similar ones like it, that you might reconsider if you want to take immediacy seriously:

- When you send out the agenda for your next meeting.
 - How can you time its distribution so that it not only suits your needs and purposes, but also shows up optimally in the participants' workflow prior to the meeting?
- How you follow-up after a sales call.
 - What information will you include to show the customer that you were listening and understanding what he or she was saying?
- What you do with the slides for your next training.
 - Will you record the presentation and then make it available to people outside the room?
- How you supplement your next support call.
 - Will you provide additional videos or additional instruction?
- How you articulate and spread your leadership decisions.
 - Should you use a social media platform to broadcast your leadership decisions?
- When dealing with a colleague or client.
 - How many just-in-time moves can you make in each moment, when most relevant, to support his or her evolving understanding? Are you helping others to access information at the right time, experts at the right time, you at the right time?

These challenges and opportunities require that we flip our thinking. It is one thing to consume the fruits of immediacy (as Steve's colleagues did and do). It's one thing to produce within contexts made possible by immediacy (as did our hypothetical traveler described earlier). It's another thing entirely to change the infrastructure of interactions, large and small, that allow you to generate immediacy for others.

Tip

For all readers: Commit to giving people information, data, or insight at the time when they most need it, not just at a time when it's most convenient for you to dump it on them or get it off your books. Of course, to make this commitment, you will have to do so authentically. To do immediacy well, a human absolutely needs to oversee the transaction. Like authenticity, there's no formula, no perfect ratio. It's an ongoing commitment to working with the person, people, or situation in front of you and constantly reorienting your own stance in order to allow others to make the adjustments they most want or need to make in order to take their next step as learners, as doers. Also, another tie that binds immediacy to authenticity is the implied commitment to know – as deeply as possible – the people we serve in our various roles. Immediacy is different for everybody and every situation. If you value it – and them – then you may have to shift your own defaults to accommodate others' preferences.

8

Rebuilding Teaching around Immediacy

Tip

For all readers: Here is another place where we'll offer a chance to skip ahead should you not be interested in an extended examination of the ways in which new understandings about how people learn have challenged traditional teaching approaches and the modern teacher's mindset (once again, look for our prompt). This opportunity to skip is another use of a teaching technique that considers pacing, segmenting information, and introducing choice. Whether you exercise the option or not, if the presentation of the option appeals to you, consider how you might use it in your own work with clients, customers, or teammates.

In a classroom, training's the thing, and it begins with curriculum. Think of curriculum as everything students learn and do in a classroom, school, or training program. Most school administrations insist that such work, as an accountability measure and because it is good for teachers to think through their courses and students to know where they are intended to go, be documented and driven by a student-facing syllabus and assignment sheet. These documents tell students what they are going to read, do, learn...and in what daily doses. They tell students what they have to do for homework, when they will be tested, and how those tests will add up to a grade.

Steve remembers his own training as a teacher. Nearly 20 years ago, he worked alongside a teacher who had been in the classroom for nearly 20 years himself. A crafty veteran, this teacher would create a syllabus, then photocopy every handout, every quiz, every test for the entire semester. For him, and his classes, the school year started with a bang, like the starting gun at a track meet. He would march his students round and round the track, over each hurdle, consistent as the mailman, stopping for nothing and no one.

Steve watched him teach a few times and he mostly lectured, telling students what he had learned (through years of dedication to his discipline, he boasted), or sometimes had the students complete worksheets in silence (they were “well”-trained, he bragged). His other piece of advice: When you hand back a paper or test, do it at the last possible moment. That way, if students want to complain or bug you about the grade, they won't really have time. “They'll have somewhere else to be...and there's no saying you have to write them a pass.” And with that, he would let out a slightly sinister laugh.

He was actually a decent teacher, modestly revered at the school. He did his job in a tidy, efficient manner, and his students left with a baseline respect for the rules of grammar, the key terms that make up most literary narratives, and possibly having taken a sip or two at the fountain of literary wealth wherein, having read something deeply and recognized something of oneself in it, the world stops and one's being is lit up like a summer sparkler. All that said, he did his job and students did theirs, all reasonably well, and all with limited noise.

Think Like the Best Teachers

But time has passed, and our understanding of learning has changed. The best teachers are not after modest gains or doing reasonably well. Like any ambitious professional, they want to be transformative and groundbreaking. They want each day in the classroom to be potentially life changing for the students. They do not mind messiness or noise. Their approach is based on research and an awareness of the possibilities that immediacy brings to learning.

On good days, Reshan aims to be such a teacher. (Steve knows; he has observed his classes several times and his thinking about his classes dozens of times). Watching him plan and execute the “Startup 101” class that he introduced at Montclair Kimberley Academy (New Jersey) in 2015 and continued to facilitate for several years is much different from watching Steve's early mentor plan and execute a class.

We'll consider, first, Reshan's planning of his course, which was based around collaboration, producing a product or service, and working across knowledge domains. Reshan looked into research

in instructional design that provides the frame/questions for how the design of the instruction or experience should be aligned to the desired learning outcomes. One initial source was the book *Understanding by Design* (Wiggins & McTighe, 1998). Going one layer deeper, he examined the sources that Wiggins and McTighe cite and use in this and other work, finding John Dewey, Martin Heidegger, and Jean Piaget.

Reshan then looked at “project-based” learning in K–12 environments and, once again, tracked down the deeper sources. And once again, he came across Dewey and Piaget. (If you haven't read these sources, you might not notice that, in his course design, Reshan focused almost exclusively on *how and why he would teach* rather than *what he would teach*.)

He also looked into research on transdisciplinary experiences (not necessarily grades K-12) in the workplace and research emerging from business schools or other professional schools on multiple knowledge domains being used to solve complex problems. This research, unsurprisingly, is also rooted in the work of Piaget.

The challenge in looking at all of this research, in a complex, multivariable setting, was to avoid simple comparative or experimental studies that surfaced easily measured gains and losses or, even worse, sought to generalize outcomes and the causes for those outcomes.

For Reshan, much of the learning design that went into this class was intended to take advantage of both the relationships in the class and emergent experiences that happened through a combination of preparation (like, for example, a carefully orchestrated field trip to a tech company) and serendipity (like what happens on the walk from the subway to that tech company). To make meaning and build skills and understanding, students in Reshan's classes journaled constantly. They had to care for, chronicle, and curate their own learning. The teacher's expectations did not become a place into which to force-fit their learning but rather a place from which to launch their learning.

The teacher gave – information, contacts, experiences – to the students at the right time to help them solve problems. Usually, the group, or subsets of the group, produced something, too, and this something could be tested in the real world, iterated upon, further refined, and ultimately pitched to a panel of master

practitioners. Feedback in the moment – from such panels, from experts who advised the classes along the way, or from Reshan himself – often led to relationships and mentorship that lasted well beyond the formal end date of the class.

Intangible dimensions of learning, like engagement and participation and the ability to build one's own learning networks, were assessed. Assessment, too, differed from expectations in that it came from more than one place. It came from Reshan, sure, but also from team members, and as mentioned, the final panel and the real world. The trick, if students were looking for one, was not to build a grade; it was to build part of a life, part of a skillset, habits, and mindsets that could lead to productive application of energy and know-how. In a class like this, they learned how to channel immediacy to help them meet their learning and doing goals.

Ask More of the Student

The departure between Steve's first mentor's approach to teaching and training and Reshan's approach is considerable.

The first approach still persists these days, but it can also be handled by computers. Students can watch the same lessons taught by Steve's first mentor, meet some daily deadlines, turn in the work, and receive a grade. With a computer, it would be only slightly less numbing than it would be with a person. It would be only slightly less of a grind. Sharing of any kind would still be discouraged, or more likely, considered cheating. Learning of any kind could take place, but the *what* of what's learned could also be programmed once into a computer and spit out on demand when someone needed it. Think about that for a second: some teachers are giving their students things that those students could easily get from a computer; and, in turn, their students are learning things that others could easily get from a computer.



The second approach requires everything from the students – they might have had to work weekends or nights, and in Reshan's classes, they often did so, enthusiastically and even proudly. They might have had to reach out to people outside the class when they hit a roadblock. Each student's work blurred into others' until individual contribution dissolved into a final product worth presenting to the world. And when the group submitted that final project for a “grade” to the real world, they were not waiting a week or more to receive an abstraction of a performance evaluation, that is, a letter grade, without further discussion. Instead, they were watching their own product or service living in the world, among real people, and collecting all the feedback that sparked off it, attentively taking notes that they converted into adjustments when they took the thing back – from the world, from the teacher – and worked on it again. What was learned belonged to the learner, to be activated when he or she chose to. What was built and shipped belonged to the world – to anyone who chose to pick it up, engage with it, try it on. The contribution of the teacher, in this scenario, was to promote contribution in others.

The first option is teacher facing and the students fade out of the picture from year to year as they learn to produce the same thing that others before them have produced; the second option is learner-practitioner facing and the teacher fades out of the picture as the students learn to produce the kinds of things that only they can produce.

It's a short step to your clients or customers – those you lead or train, or to whom you sell.

The first approach gives you what you need. In fact, it's set up to produce a steady stream of easily categorizable work – to or for you, the teacher, the categorizer.

The second approach gives the student, the learner, the client, the customer what he/she needs – continuously, throughout the process – to be prepared, to assess his or her own progress, and to assess him or herself as a product or service goes live.

Make It Messier

We're now going to spend some extensive time with an actual student from Reshan's Startup 101 class because we believe it's important, as teachers, or people trying to adopt a teacher's mindset, to shift the lens from teaching (what teachers do) to learning (what students know and can do as a result of an interaction with a teacher).

Moving from teacher to learner is a flip that could just as easily be performed in sales (what customers know and can do after a sales interaction), service (what customers know and can do after a service call), leadership (what followers know and can do after working with the leader for a period of time). With that said, this section will be most relevant for trainers, since it will give them an insider's look at the mind of a truly empowered learner (i.e., trainee).

One more thing before meeting the student: this kind of observation of one's “customer” is good for customers, obviously, but it is also good for the company agents themselves. It puts them closer to their work and gives them insights into how to improve that work. Also, it's good for companies, because it moves all decisions and conversations closer to the customer experience and away from things that can distract from that end goal.

In traditional schooling, the mark of learning is a grade. In more progressive approaches, like the ones we're championing, the mark of learning is the transformation of the student him- or herself. We believe that these shifts in perspective pay dividends in the life of a student, and we believe that such benefits could easily

transfer to the life of a colleague, direct report, client, customer, trainee, and so on. Whenever people shift into the mode of a teacher focused on, if not obsessed with, the learning of others, they stand to benefit the people with whom they most directly interact.

Nico Espinosa Dice, a student at Harvey Mudd College at the time of this book's writing, is the student on whom we will focus.

Nico's experience in Startup 101 is reflective of what happens when a teacher creates an experience that offers immediacy to his or her students – giving them what they need, when they need it – while also teaching them to apply the tools of immediacy – that is, helping them to develop the skills and mindsets to pull in what they need when they need it.

When Steve and a colleague (Jill Maza) interviewed him, Nico started off by describing the process that Reshan set up for the course. The process asked the participants to seek constant feedback and make adjustments based on that feedback. Nico responded well to the challenge:

I like the experience of trying something, failing, trying again, and figuring it out. It's an interesting form of problem-solving. (Espinosa Dice, personal statement, 2018)

As you know if you've been through either, the typical school or training experience is often much different from what Nico describes. In a traditional classroom, if you try something and fail, then that unit is over. You either have to do it again to reach the desired result of the teacher/trainer, or you have to roll that failure into an accruing average grade that will be printed on a transcript or, ultimately, determine your worthiness to graduate from the training program. And you certainly wouldn't “like” that kind of failure in that kind of setting.

From the start, Nico and his group described a very different relationship with failure and therefore a very different relationship with learning – failure meant that they had to start again and find a different way to attack their problem. And they found such failure – such fuel for learning – by receiving feedback directly, immediately, from their environment. They didn't have to wait for a teacher to tell them how they were doing.

As Reshan observed their work – they were asked to document it publicly each day so that he wouldn't have to guess at what they

were thinking or where they were at in their process – he layered in tools and approaches to aid in their problem-solving. He not only wanted them to learn well, and apply what they learned, but also to be stronger and more capable each day. Here Nico reflects on brainstorming with rigor, a concept that Reshan introduced early.

I thought that brainstorming was just throwing out ideas and seeing if they hit the wall. Reshan showed us that brainstorming was a much more strategized type of idea-creating – I don't think I have ever been a part of anything like that. Creating ideas...there really is a strategy behind it, like there is a strategy behind marketing, or business, or anything like that. (Espinosa Dice, personal statement, 2018)

Reshan then pushed further, helping students to sharpen their approach by focusing on problem-finding and constant testing with potential users, all noted and appreciated by Nico.

There's an issue with that sort of thinking, where you say, “I want to start a company. What problem am I going to solve? Or what company am I going to create?” That gears you toward solution-based thinking, that is, you're thinking of a company that is a solution to a problem. The issue with that is that the problem may not exist. So, trying to align yourself with the user or the customer has been a big focus and something that I certainly didn't realize coming into it.

The design process employed, and directly taught and overseen by Reshan, gained oxygen from immediacy. Students were coached to continually test their assertions against relevant, even emerging research and via up-to-the-minute surveys, up-to-the-minute contact with a real-world audience. Reshan's role as the teacher was to help these students access what they needed, when they needed it, to solve problems that were important to them.

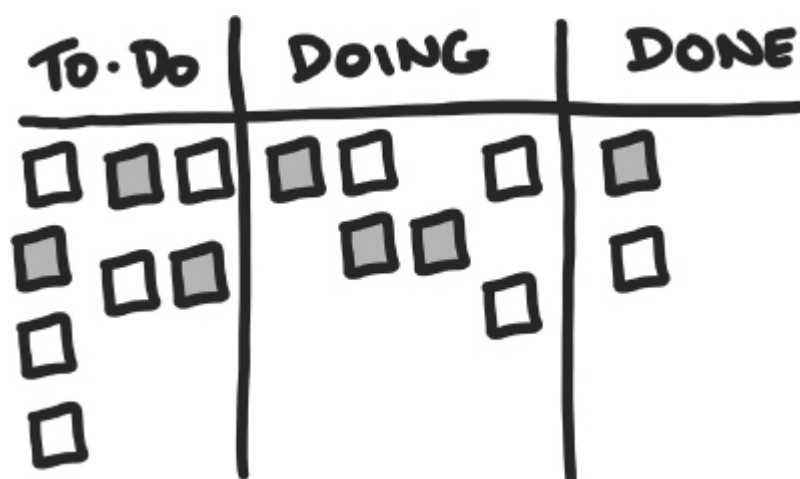
And if feedback was the first tool of immediacy that the students learned to wield, the next tool involved networks. When necessary, Reshan introduced either his own counsel or encouraged the group to reach out to others who might help them. While networks can often deliver contacts, insight, or skills at the right time, they can also deliver psychological benefits when times are tough or a project is lagging. Here, Nico articulates just that:

We had an idea. We pursued it, researched it, and realized it didn't work. We tried to pivot to another iteration, didn't like that, and ended up pursuing another idea through one or two iterations, and that didn't work either. We were really supposed to have had our idea at the end of the first week, but talking to Dr. Richards and talking to other people who know the startup process, we learned that [idea generation] is certainly not a process you can rush because the idea is central – it's what you're going to build off. (Espinosa Dice, personal statement, 2018)

Additionally, networks can aid in immediacy if students – and others – learn to activate them at the right time. (Note how far afield we now are from the vacuum-packed courses run by Steve's original mentor.) Nico described that process:

We have this board in the room that we're working on. We have Post-its on it [detailing] tasks or projects that we have to complete. A lot of them are contacts that we want to reach out to. Figuring out when to tap into each contact is very important. [For example,] Dr. Richards has a friend who's a venture capitalist. We didn't want to jump right to him before we had our idea because he might not be able to help us there.

I think it's been an interesting experience trying to visualize all the contacts in the networks and essentially the help that you have [access to] and figuring out...it's almost like a puzzle, like when do I place this piece there?



And then there's the ultimate lesson, which is that you want to be part of someone else's immediacy options, you want to be accessible, engage-able, and helpful when someone else needs you.

That's the moral lesson of transacting in this kind of win-win-win manner, and Nico certainly picked up on it.

A little of it, too, is, “What can I give back to them?” When there's a relationship, there's a give and take, so trying to figure out what we can return to them [is important]. Dev Basu, CEO of Powered By Search, was [helping us] out of, really, kindness. He had a relationship with Dr. Richards. But eventually, hopefully, we'll be able to give something back to him. Maybe sometime when we're in a situation where somebody says, “I need a marketing company,” we'll point them in the direction of Powered by Search. (Espinosa Dice, personal statement, 2018)

All of the above adds up to a fundamentally different kind of educational experience. In teaching circles, it is sometimes referred to as active learning or project-based learning. Done well, the outcome is not a strong grade but a strong student – a student stretched beyond where he thought he'd be.

Many students – and adults – sleepwalk through passive learning environments just long enough and competently enough to earn a ticket out of them. They deserve better; the institutions they go on to serve deserve better. Better, in these cases, begins with the way in which we design learning experiences, whether they be one-time customer interactions, sales transactions, graduate level classes, or company training programs.

What we know about teaching and learning validates experiential practice as a means to building understanding (in one's self, in someone for whom you are responsible). If you want someone to understand something – whether it be entrepreneurship or a product or a service – don't just tell them about the work but have them experience it, even if this experience is messy or leaves open loops.

In sales, for example, if you are selling a new piece of software, you can describe the features or have the customer experience them, trying them in a pilot. This move might add time to the sales cycle, but it raises the probability that the customers will make an informed decision of why they wanted to buy or not buy.

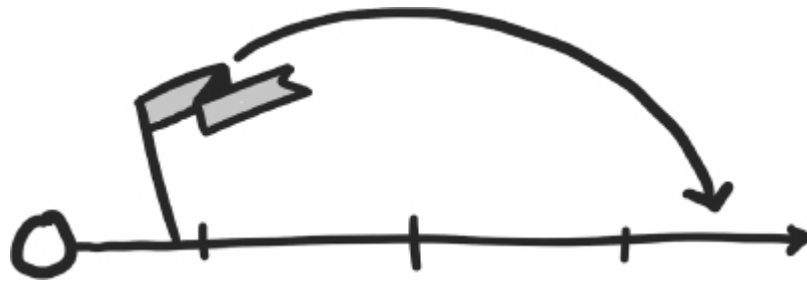
As a leader, you may already know the decision and the direction you want your team to follow. But building in messy time to explore, discuss, and analyze the problem will help to build buy-in,

or at least an understanding of your direction, even if it is not one with which your team agrees.

In training, it might take longer for learners to practice, receive feedback, and revise their articulation of a response or explanation of a new product or service, but it will be more effective than if they just checked off answers on a quiz.

In service, explanations matter. After resolving an issue, an effective service professional will spend time with the customer, explaining what happened and how and why a solution was applied. He or she will then give the customer a chance to ask questions and will answer them respectfully.

As Nico described, immediacy of experience often leads to long-term perspective shifts, deeper relationships, and network gains.



9

Rebuilding Training around Immediacy

At a consulting engagement at the corporate university of a global communications company, Reshan had the chance to apply lessons he learned in school settings to business. A quick description of the assignment, its challenges, and the emergent solutions offers a clear picture of how to apply a teacher's mindset to a corporate problem.

Though not dealing with elementary, high school, or university students, he was still dealing with learners, our most common human name, and this allowed him to focus his thinking and, ultimately, advice in a way that would best position the recipients of the training to acquire the skills and habits that they would need to thrive. In short, it allowed him to flip the traditional approach to training, which is often trainer-centered rather than learner-centered.

The leader who had hired him needed insight on the design of a 16-week, cohort-based work program. Entry to the cohort was highly competitive – it consisted of 10 people yielded from a 0.1% acceptance rate. So, for everyone accepted, there were 102 rejections. Think Harvard, only more difficult to get into.

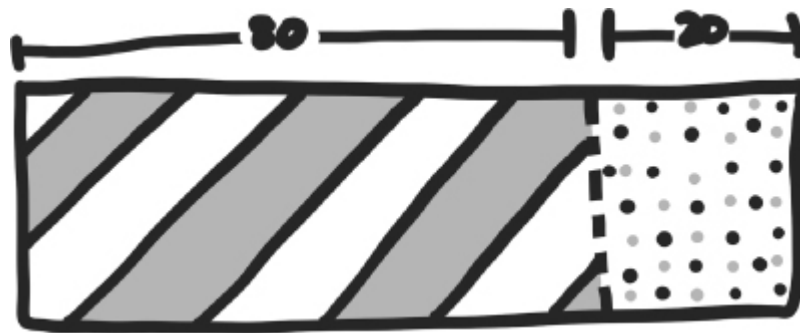
And think Harvard, only with more potential. Thinking about the group in advance, Reshan could only imagine what they could accomplish if they were truly inspired, truly unleashed, truly empowered. Sure, they might learn some of the broad brushstroke skills and understandings and mindsets of a typical employee at this company, but a group like this also had the potential to pull the ship itself – to rethink the way things were done. What a gift to them; what a gift to the company; what a gift to the industry.

Unfortunately, though, the “classroom” was not optimized for learning and therefore would not be anyone's idea of a gift. It was optimized for what teachers call “coverage,” which is the idea put forth and mastered by Steve's first mentor and many teachers before and after him: that is, “We're going to cover this material regardless of the students in the room. Some might be ahead and

want to move faster; some might be behind and want to move slower; but my job is to move the entire class at the same pace.”

A teacher's job is actually not that at all. It is actually to help students make sense of material and then make meaning of the material. Though we often cannot teach one-to-one, with every student having one teacher and a completely personalized curriculum, we can teach with an intent to ensure that each student finds personal relevance in the material and uses that relevance to make meaning of it. Not everyone can do that at the same speed.

Reshan listened to more of the description of the cohort and training program. It was for recent college grads. Eighty percent of it was “delivered” via lecture; 20% of it happened in the field, where students could test the material gleaned from the lectures, somewhat catch-as-catch-can, in their sales jobs.



He felt like there had to be a better way. In fact, he had seen a better way, designed a better way, looked at research that supported a better way. Luckily, the person who hired him had a similar hunch, and as he described the class, it became clear that he was not pleased with its current form. In fact, he ultimately defined the problem for Reshan in simple, businesslike terms: he wanted to be able to prove that this meticulously curated, highly talented group was not spending 80% of its time, for 16 weeks, sitting and being lectured to and listening to information that may not have been relevant in the moment. In more educational terms, he did not want them to have an experience that would allow them to hit a rut and stop, one that would allow them to go through the day passively, one that would teach them that corporate life was about keeping your head down and not getting much done.

After understanding the issue and the goal, Reshan proposed the idea of totally inverting their original model – layering it over a

bed of immediacy – so as to make the instructional time more relevant, active, and challenging.

He suggested using 80% of the time to allow cohort members to collaborate, apply their learning, and demonstrate their understanding. The cohort members could then use the remaining 20% of the time to view video content – from a curated video library of proprietary videos – to supplement, emphasize, or deepen what they were learning.

In order for the learner's role to shift, though, their instructor's role would also have to shift. Instead of lecturing, he or she would facilitate and offer expert insight and coaching, helping the cohort members to develop the kinds of immediacy instinct that would help them to better serve clients. How? The instructor would help individual cohort members figure out what kinds of resources they needed to pull and digest – from the video archive or elsewhere – to fulfill a certain job at a certain time. The instructor would help to train their instincts, in other words, for what they needed...and when.

Tip

For leaders: Think about your meetings and how time is spent with people. As a leader, one of your responsibilities is to honor your team's time and talents. Ensure that most of the time, in face-to-face meetings, attendees are doing what only can be done when they are all together. Offload information and content delivery to a different medium to free up time for more interactions during the meeting.

There is a saying in the teaching profession: Whoever is working the hardest is learning the most. Too often, it's the teacher. So, if the students were preparing to do a sales call with a dry cleaning chain to sell them some new phone products, an effective facilitator, one who was an authentic and masterful practitioner himself or herself, would help them understand what information they would need to know to be best ready for the call. Then, he or she would let them work to figure it out. With enough practice, throughout the cohort experience, with enough effort and engagement, the students would return to the “real world” of work with a new way to approach that work, a new way to do that work.

They would thrive in that real world because their training brought them as close as possible to the real world – with a just-in-time rather than a just-in-case learning experience.

There would be no need to look at security products and sit through two-hour lectures on the company's security offerings when the next assignment they were going to complete, learn from, and on which they would be assessed had nothing to do with that information. They would need that lecture – or, rather, parts of that lecture – when they were going to engage with a client, colleague, or manager in need of insight or information about security products.

Another teaching insight is that practice doesn't make perfect; only perfect practice makes perfect (Lemov, 2012). Reshan was proposing perfect practice, which would help the students, or in this case, salespeople, learn by doing, picking up habits and mindsets that would allow them to continue to grow, innovate, do, adjust, be agile, and be active participants in solving novel, emerging, or changing problems for the company. If you don't want people to be passive “on the job,” then you cannot allow them to be passive during the training for the job. Likewise, if immediacy is a required skill, then immediacy has to be part of the training. It has to be foundational (McGhee, 2012).

Train People to Be Immediate

We spoke with a colleague, Damien Barrett, who for many years led an apprenticeship program for middle and high school students interested in becoming Apple-certified Mac technicians. His job with this group was to prepare them to work the physical help desk at a school that deploys approximately 1,000 laptops to a range of people, ages 9–70-plus, with a range of technical know-how. Mac techs in this setting not only had to receive machines and deal with confused, rushed, and often frustrated people, but also they had to work on and under the hoods of these machines. In other words, they had to solve problems, both human and technical. No two shifts were the same, and often a solution that worked one day didn't quite work the next day, as changes and updates in Apple's technology were ongoing.

To become certified for such work, they had to pass a test; Damien prepared them for both the test and, more important, the work

that followed should they pass the test. We had heard that his training approach had at one point shifted dramatically – from one of coverage to one of facilitation. He had to shift from trying to figure out how to cram information into human brains to helping his proteges figure out how to find information for themselves, at the moment when they needed it.

The shift was one he was grateful for, allowing the training itself to be more like the real-world work environment in which Mac techs found themselves each day. It was precipitated by a shift in Apple's assessment strategy (in the test). The test was no longer divorced from the ways in which a real tech would work. The test, in other words, was no longer “closed book.”

Tip

For trainers: If you want to shift learner behavior, shift the incentives. This won't build internal motivation, the gold standard for teaching, right away, but it will quickly get people's attention and jumpstart new approaches to learning.

In Damien's own words:

The program [now] actually encourages open book and open notes when taking the test at an accredited testing center. This did not used to be the case, but they changed their policies to reflect how “Mac Geniuses” actually worked at the stores. There was now a greater focus on the soft skills and interpersonal skills and knowing how to look up an answer rather than memorization. (Barrett, personal statement, 2018)

Make Room for More Learning

Steve's early mentor, a maximalist if ever there was one, did a lot – more than his students most days. He was meticulous in his planning, rehearsed his lectures, and wrote easily gradable assessments, which meant putting in a great deal more work up front. If you write a multiple-choice test, it takes a lot of time to write, but very little time to grade. If you write an essay test, with one or two questions, it takes far less time to write the assessment than it does to grade it.

However, as Damien's story illustrates, modern teachers, facilitators, and trainers almost seem to be trying to do less. There are compelling reasons for such minimalism.

Doing less, though, is probably the wrong way to characterize it. Doing less of the student's work. Doing less of the thinking and problem-solving oneself. Doing more to restrain oneself from swooping in and helping the student or group along, when the muddling through, the effort, is what is essential. These are the moves of the master teacher operating in the “new now.”

Reshan, as described in his Startup 101 class (see [Chapter 8](#)), worked hard to restrain himself from giving all the answers, from writing tests that could narrow the scope of learning, from opening all the doors for the group who would then not learn how to open doors for themselves.

In education, we used to describe teachers as the “sage on the stage,” something akin to the Robin Williams character in *Dead Poets' Society*, arms akimbo and charisma to spare. It's no longer seen as necessary or even productive for a charismatic teacher, clearly moved by the beauty and elegance of his own discipline, to deliver the gospel to the onlookers. Short lectures can stimulate learning, sure, but they have to be woven in with other very intentional strategies. It's not that lecturing can't work; it's that it doesn't work as well or as often as we think it does. You give a great lecture, you often feel great. You feel like you've done your job. But you have no idea what happened in the brains of your students (those black boxes described in the first section of this book).

David Hessler, one of the most seasoned teachers we know, describes his own evolution in very relevant terms:

For many years I was under the impression that entertaining students was an important part of getting them to buy into the education process. However, [my work with] a master teacher helped me see a path I could take which would elevate my teaching and therefore improve the students' learning experience in my classroom. The influence happened when I came to study the martial art of judo under Yoshisada Yonezuka. I learned a great deal about judo and earned my second-degree black belt under him. It took me several years to realize that although I was paying for judo lessons, I was also learning how to improve my teaching by observing Yonezuka in class every day. And what was he teaching me? That mastery in teaching is really about subtle adjustments to each individual student. Sensei demonstrated in every class that too many words can confuse students or lead them in the wrong direction. That instruction by the teacher has to be at the right moment when a student is ready to hear it and take action in response to the teacher's instruction. Basically, I learned the skill of timing and also how to be more economical with my guidance. I learned that every student's judo style would depend on his/her mindset and physical qualities, much like my own classroom students'. (Personal statement, 2018)

In teaching, especially for teachers who are still insecure in their craft, filling classroom time is a common survival mechanism. Only as teachers become more comfortable, and student centered, are they willing to ask a question and not call on the first hand that is raised (this is called "wait time") or simply fill the void with their own masterful explanation. This is also why masterful administrators, when watching a class, will often watch the students instead of the teacher. It's not that the teachers' actions don't matter. The students' actions simply matter much, much more. What are they doing? How are they filling their time in the classroom? How are they making meaning of the material? How are they showing their work and their thinking? How are they constructing their own knowledge so as to be able to port it out of the room and apply it in other classes and their own lives?

Tip

For sellers: When approaching a potential customer, instead of telling her everything about your product or service, ask questions – and then patiently wait for responses – to uncover the customer's needs, fears, and the gravitational pull that is preventing her from leaving an existing product or service.

For leaders: You're often in a leadership role because you're good at crisis and/or personnel management. The next time someone comes to your door with an issue, resist the urge to offer your take or your solution. Instead, ask questions to help the person who brought you the problem to figure out a solution at his or her level. Allow the person to surface, then evolve, then own a course of action, and tell him or her that he or she will have your support. Then, schedule a follow-up discussion to debrief.

For service professionals: If you visit the same home each season to solve a problem that the owner should be able to solve himself or herself, consider training the owner to solve the problem so that you can then work on other, more sophisticated issues to add more value to the property over the long term. More broadly, if you notice a trend in a client's or customer's inquiries, consider training your client or customer regarding an underlying issue – either in conversation or by sharing a link to a resource or article (or even a course or conference). By sharing a valuable, tested resource with him or her, you add value to the relationship.

10

Communicating with Immediacy

In the first section of this book, we looked at the way in which authentic outcomes can occur when a human being oversees a transaction, even if that transaction is aided by technology. Pairing that concept to our current topic creates a moment of powerful synthesis: immediacy paired with authenticity, just-in-time resources provided within a deeply human context.

Hopefully, you can begin to generate your own ideas around this synthesis and its driving question: What happens when a human gesture shows up at the precisely right time for someone?

For us, two of our favorite examples come from the world of Slack (a communication platform), 18F (a user-experience design firm that partners with government agencies), and Lyft, a ride-share service. It should be noted that none of these “research subjects” knew one another and that it's highly doubtful that they were all reading the same playbook or attending the same professional development conferences. From what we could tell, they all came to value and practice immediacy by paying attention to the people they served, whether that was a customer or an employee. (Like good progressive teachers, then, they were using the needs of learners to figure out what to do with their “classroom” time.)

Train Systems to Be Immediate

At the time of our writing of this book, Slack described itself as a “cloud-based set of proprietary team collaboration tools and services” (Slack, 2018). In essence, it created seamless digital communication, allowing teams (like Nico's, described earlier) to work effectively in a distributed manner. It also worked well for nondistributed companies that wanted to bundle their internal communications in a single environment. 18F was “an office of federal employees with the General Services Administration that collaborates with other agencies to fix technical problems, build products, and improve how government serves the public through technology” (18F, 2018).

In a blog post, Maya Benari, who worked for 18F, explained how to “hack inclusivity” within Slack's burgeoning communication channels. Since the digitization of communication made possible by Slack also made possible, programmable, and repeatable an educational intervention, one geared to making workplaces more inclusive, Benari and her team saw a chance to make a simple and important training point more immediate.

Before looking closely at Benari's intervention, let's take a step back to create some imagined context. Let's assume that, as a leader of a company, you begin to sense that your company is not doing all that it can to help women thrive. Perhaps you have heard from some women about perceived limitations around promotions. Perhaps you have done some studies to find that women are not compensated as well as men. Perhaps you have received a complaint about harassment. Perhaps you simply have been paying attention to the news and decided to make some changes in an arena that you can control. Perhaps you have been talking honestly with some of the men in your office and come to a conclusion that, indeed, the workplace is slanted in their favor and needs to be reset. And, due to one or more of these instances, you have decided to take action.

After considering the issues further with your executive leadership team, typical moves at this point could include: a speech from the CEO or an executive, a speaker or consultant and a workshop for all employees, recurring visits by someone from an HR department, case-study work, surveys, formal policy shifts, and so on. All of that adds up to traditional teaching and learning measures with the hope that the training sticks, behavior changes, and the workplace improves.

All of that can be useful and often is necessary. But it can fall short if it doesn't do the deep work of helping employers to address their company's blind spots and some of their micro-level behaviors. Because, after all of those trainings, workshops, guest speakers, and policy changes, residues of bias can linger, and those residues, over time, can demonstrate to your employees an asymmetry between mission and what matters – the day-to-day work, action, interactions, and output of a company. An asymmetry between talk and walk. A negative, creeping form of immediacy that appears just in time to remind people of a gap between understanding and action.

An example of an added measure, assuming your company uses Slack or something like it to manage internal communications, comes from Benari, to whom we now return. In the blog post referenced earlier, she describes a method to program the Slack environment to send a gentle reminder to users anytime they fall back on language that works against the company's diversity and inclusivity efforts.

[We] noticed people saying the word “guys” to describe groups of people in our internal Slack chat rooms. Not a terrible error, but we want to build a diverse and inclusive workplace where people use more inclusive language. (Benari, 2016)

Having identified the problem, and being aware of a solution that would address it every time without the need for further human intervention, they “customized Slackbot's auto-responses to respond automatically with different phrases if someone uses the words ‘guys’ or ‘guyz.’” The bot would pop up automatically with alternative phrasings from which to choose: “Did you mean *team*?” or “Did you mean *y'all*?”

Here's what it looks like in action.



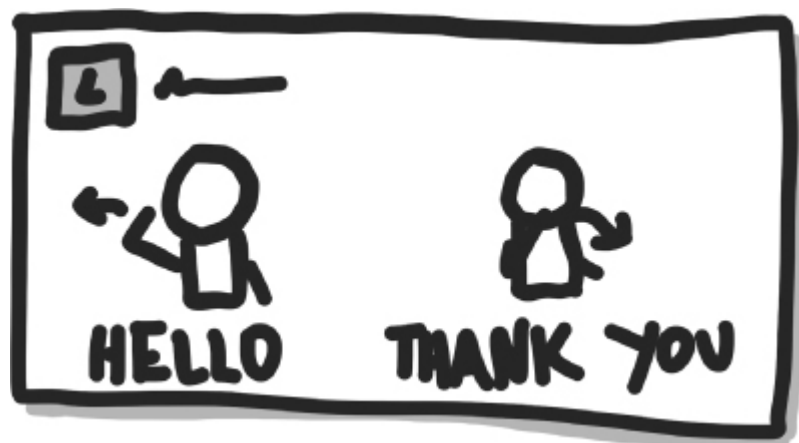
Benari's blog post then went on to unpack the move it described. Its authors did not want to make anyone feel bad. But they did want to step into the middle of an automated behavior, to interrupt a habit that many, many people have. Many people, when they address groups, use the word “guys.” On the flipside, if they instead addressed a group as “gals,” they would immediately feel a slight tension. It's better to choose a word that won't isolate the gender of anyone in the room.

According to Benari (and all points with which we agree), this kind of attention to the finer points of language is necessary:

[We] cultivate an inclusive culture by valuing, respecting, and supporting the needs of every individual. It's important to listen to voices from a range of backgrounds, races, locations, gender identities, income levels, ages, and levels of experience. This ensures that every person feels comfortable to be themselves at work. (Benari, 2016)

This kind of thing can't replace the other intentional work mentioned above – the training sessions, the aligning of company talk and behaviors to new norms, the rethinking and revision of policies, the ongoing collection of data to ensure that things are really changing. But it's a powerful partner to that work – a reminder that, on the most granular level, the very sentences we use to loop humans together should reflect the highest intentions and aspirations of the company. We all have blind spots; it would be awkward to continually point them out in person; Benari's solution sidesteps that, automating something respectful of humans in a manner that is also respectful to humans.

We noticed that Lyft made a similarly automated move – for a seemingly similar purpose of reducing some of the rough edges around diversity and inclusion work and so allowing that work to flourish.



This simple “inclusivity hack” allowed someone deaf or hard of hearing to contribute seamlessly to an occupation by interrupting and repurposing the typical, most likely unchosen, norms of that occupation. If customers were used to calling their Lyft drivers on a cell phone, then the company might not be able to hire someone who could not respond in that instance. By shifting the channel –

to text-based messaging – at the outset, certain problems dissolve. The driver benefits; the customers gets what they thought they were paying for, in terms of service; and the company and the industry benefits by being able to hire the best drivers rather than the people with the best hearing capacity. Win-win-win.

Tip

For service professionals: Lyft's throwing in of a training video in the above referenced digital communication is a way in which immediacy aids recipients in acting on the information provided. They know that they can text the driver and they know that they can communicate visually once they are in the car with the driver. This gesture can also contribute to delight, which we'll discuss in detail in [Part 3](#).

Ignore Immediacy at Your Own Peril

As we tie more of our work, interactions, and transactions together with technology, we're generating more “pop-up” type experiences. First, we want you to know that such things are possible, and we want you to notice them in your lives. Second, we want you to know that, just because such things are possible, doesn't mean that all examples are beneficial to either the recipient or the sender. If you're going to employ immediacy, make sure it reflects your (or your company's) values, mission, and beliefs. Make sure it feels human and additive rather than merely efficient. Seth Godin's “permission marketing” rule should still be in effect (Godin, 1999).

At the same time, if you're going to sidestep or ignore immediacy-based solutions, make sure your silence isn't speaking too loudly. Here's the problem with immediacy in general, and the earlier examples in particular: we know they exist. We know they are possible. Increasingly, your employees will know they are possible. The fact that you can program a bot in a communication platform within your work environment to say anything in response to certain language (e.g., unnecessarily gendered or intentionally hateful) means you probably should, especially if you start to notice that such language exists in the environments that you

allow to flourish at your workplace. So you can preset the immediacy with intentionality, with authenticity.

Such a move could certainly get out of hand or start to lose its authentic feel. You can't just set these things and forget them. You have to monitor them, check in with the people they affect, so that even when delegating work to bots you keep your human fingers on it.

Tip

For leaders: The stakes are high and getting higher. There's a gulf that can come to exist between what a leader doesn't know or address and what his or her followers know is possible. You don't want to be a leader for whom the following is said: "He or she can _____, so why isn't he or she?" You don't want that gulf to get too wide. You avoid dealing with – and dealing in – immediacy at your own peril.

As immediacy moves from a nice-to-have to a need-to-have, from a distant frequency of leadership to a core dimension, the leader doesn't have to know everything about it or even how to leverage it him or herself...but knowing that it is possible, and knowing how to ask questions around it or promote it – or pay for it – is a necessary instinct.

Communicate in Immediate Environments

Let's work our way through some examples to demonstrate, and train, what the immediacy instinct can look like from the granular level to the global level.

Here is something you might be missing, or skipping, in your efforts to communicate with others so as to build their understanding (another name for teaching). In a text-based environment, it is often possible to know when someone else has received your message. Either your message changes color or a read receipt is triggered or you see three bubbles pop onto your phone's screen to indicate that someone is typing a response. As the sender, then, more immediate information is available to you. As the recipient, on the flipside, more immediate information is available *about* you as you scroll through endless messages, ignore

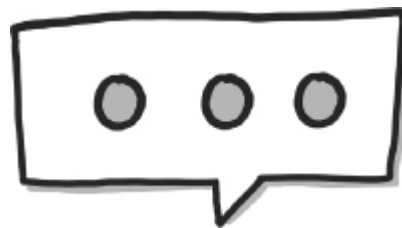
some, react to others. The ways in which immediacy has been baked into some SMS and email systems, then, affects the continuing communication transaction in which you are seeking to engage.

Here is why that matters:

Say, for example, you were riding on a subway toward the airport at the start of a three-day business trip. Freed up from your usual grind, you had a new idea, one you thought was possibly brilliant. Excited, you pulled out your phone and texted your manager – the idea of email did not seem immediate enough, at least from your perspective.

Even more excited, you saw that your manager received your message and apparently reviewed it, because text bubbles appeared. She was responding.

Then she was not responding. For some reason, she pulled back, erased whatever she had composed, and moved on with her day.



As you hustled toward your connection, you kept checking your texts each time you had a moment or delay, eager to see if she had responded.

When, after several days, your text, your brilliant idea, remained unanswered, you would be forgiven for doing what even the most optimistic among us might do – totally and completely question the original idea. It's not uncommon for humans to fill empty space with worst-case scenarios; that's how many of us are wired. By the time you walked back into the office after your trip, you might be nursing a sense of embarrassment, if not dread.

Now let's pretend you're the boss who received the text. You took the time to read it. That much is known by the sender. You knew the sender was going to be out of the office for a few days. Regardless of whether you loved the idea or hated it, were in the middle of an emergency or had plenty of time, the least – and also probably most – you would have had to do in this situation to keep the communication loop feeling positive, was to write a quick text

in response: “Thx, swamped, let's meet on this when you return.” Or, “Nice idea. Set a meeting with me when u can 2 discuss.” And if you wanted to be really positive, you could throw in a “have a nice trip.”

As a receiver of information, especially if you're in a position of power, you have to be aware of the ways in which immediacy changes the communication game, even if ever so slightly. Anyone who has ever been managed, successfully or unsuccessfully, knows that small gestures add up. EQ in a manager often matters more than IQ. And much about communication has not changed – except that it has been magnified, made articulate and immediate.

People have always had an expectation that others with whom they are communicating will close loops. People have always wanted to be heard, even if the listener ultimately disagrees with them. These are baseline expectations. Human expectations.

People's digital markers have evolved, telling them when their leaders and colleagues are closing loops or listening. As a communicator, being aware of such markers, and how your actions or nonactions might be interpreted within such communication contexts, is part of mastering the communication game. At the very least – and often at the very most – if you're not ready to respond to a text or even email, you can acknowledge it and let other people know an estimated time for a response or a timeframe for review. Even if it's going to take you a week, naming the silence is often better than letting it fester, especially if you're in a position of power. “I'll be able to give this attention next week. Thanks for sending.” How long would it take you to write and send that?

Less granularly, and as a devotee of immediacy, Reshan handled communication within his company with immediacy at the forefront of his mind. As someone who respected his colleagues enough to try to give them information at the highest point of impact rather than simply when he wanted to move it off his desk or mind, Reshan made very conscious choices about his communication practices. As the leader of an organization that rarely met in the same room (and really, what organization, these days, does?), he could not simply think about the message he wanted to send; he also had to think about how he wanted to send it, through which channel. And, what's more, he had to think about how the choice of channel would impact the content of the

message itself. All channels have affordances; all channels have limitations.

Tip

For all readers: Immediacy is about experiencing or acting upon something at the moment when it is most meaningful or impactful, so some people might call it just-in-time or at-the-right-time. Think for a moment about feedback you may receive as part of your job. Viewed through a lens of immediacy, receiving the right type of feedback at the right time, or being able to access it when you are ready to process it, is crucial. So, if you need time to breathe or think or reflect before inviting critical external feedback, there are mechanisms that provide that choice to receive that feedback when you most immediately need it. (Again, not necessarily instantly).

For sellers: Outside of companies and classrooms, away from direct colleagues and students, communication patterns ripple even wider and are still impacted by immediacy. As a salesperson, there is a lot to be said about closing loops with customers and clients and finding ways to make sure that, after some important interaction has happened, you complete a very humane follow up. Makes sure the conversation resonates and confirms understanding. Look for technologies that help to make that possible to do.

For leaders: The immediacy of communication can make employees or team members feel uncertain if they send something to you and don't get a response right away. Doubts linger and imaginary paths get constructed for all the reasons you might not be answering. It almost sets up an unfair expectation of how quickly you can process, consider, and thoughtfully respond. On the other hand, immediacy rules can be set up so that you can be present for your employees when you need to be – having a permanent link or connection to you. (Again, as long as the response expectations are thought through).

For trainers: Immediacy makes it easy for your audience to “tune out” and find something more interesting – especially in remote/distant learning settings. This optionality makes it hard to keep a group engaged when they can quickly find something else that fits their interest. On the flip side,

providing immediately accessible resources can allow learners to access the content, tip, or steps they need when they need them.

And finally, we come to an even wider application: the flipside of immediacy, where all communication is crisis communication. Where, because of immediacy and its tools, stories can whip around the world almost as soon as people experience them.

Manage Crises Born of Immediacy

The tools of immediacy have altered the environment, and the muscle, of crisis communication. While schools and companies want their actions to reflect their missions, stumbles and silences off mission can and do happen and are often magnified, shared, and discussed on a mass scale. The communications around these stumbles – or lack of communications in the case of silence – can change perceptions of stakeholders, shareholders, and/or clients and customers.



The management of all of the above has shifted, too. It's not just about getting back on mission. It's about getting back on mission in a way that others, within and outside your company, can see when they are considering a transaction with your company. It's about rebuilding or reclaiming an understanding in the most unknowable and unpredictable of spaces – the minds of others. It's about – what so much of your business is about – teaching your way back to symmetry, whether it is symmetry between what a buyer understands and what a seller understands, between what a chief learning officer knows and what a workforce knows, or between the CEO's intentions and the public's reception.

We spoke to Keri Potts, senior director, PR for college sports, ESPN, to help us understand the broadest possible implications of immediacy on communication. Steady, funny, honest, and with deep roots in the PR industry, she was particularly qualified to comment on a peculiar modern inversion of a crumbling axiom about change and sameness: the more things stay the same, the more they change.

According to Potts, there was a time when there were rules about how to handle your company's public relations needs. A clear strategy or goal could be executed based on an industry accepted cadence and rollout.

There used to be a known element of newspapers, filed at 5 o'clock. That was your opportunity. If you missed that deadline, then you had another day to work on whatever it was that they were coming at you with. A lot of newspaper reporters would call you at 4:30 or 4:45 and tell you that you had 15 minutes. (Potts, personal statement, 2018)

Such consistency allowed PR to be managed in a way that was thoughtful, even civilized. You could pick the time, path, and placement of your communication. You could decide which audience would see it, and when. You could decide these things, according to Potts, based on whom you wanted to “influence, convince, or bring on board.” Then, when you were ready, you issued the press release or provided the information.

With immediacy, and the tools of immediacy at many people's disposal, everything has changed. The cadence has changed. Thoughtfulness is a luxury – one rarely enjoyed.

Potts explains simply: “Everyone on Twitter is a quasi-news person now; everyone is a town crier.” There are pros and cons to this commingling of professionalism with amateurism. It's good that stories about company misbehavior get out, for example. It's good that we hear about executive decisions that, at one time, might have floated below the public radar. As customers of certain companies, we want to know about the way they handle issues that matter to us, so that we can decide if we want to continue to spend our money there.

But regardless of the merit of some of the stories that gain wider exposure – and there are plenty – many stories are launched with “no vetting and without the traditional ways we have been taught.”

This leads to not only an erosion of a cadence, which can be downplayed as a mere convenience, but also to an erosion of ethics and integrity, which can never be downplayed. Potts explains further:

The thing with immediacy that has changed in my industry is having to let go of the foundation that so many of us were brought up with. That is, doing things the right way – everything from getting people on-board, agreeing with the message and how you are going to approach it, [and thinking about] what is responsible, what is ethical – all those kinds of things. If you try to hold onto that now, it is the scenario of, “the operation was a success, but the patient died.” (Personal statement, 2018)

When pressed for ways around this or out of it, Potts acknowledges that the work is difficult, if not impossible. Fact finding, by definition and design, is slow. Organizing executives and building consensus, in any particular company, is even slower. While you're busy doing your work thoroughly and well, “public opinion is off and running.” So, in some cases, you simply have to weather the storm; you simply have to wait until the news cycles catch onto another story and yours fades from view.

During the weathering, though, silence is rarely the best option. It's simply too loud. Potts continues:

When you're silent for a long time, there is a belief that there is some kind of conspiracy or you are hiding something. It is the weirdest thing to me that it is an admission of wrongdoing instead of [a sign that you are] taking time to get things right.

Which returns us to the miniscule, the granular. Think of those three dots that show an individual that you are in the process of replying to a text, one-to-one. This is the same thing, on a broad scale, when you represent your company, one-to-many. People see the dots. They see you typing. They are waiting for your text. They have an expectation that you are going to close any loop that's been ripped open. If you don't respond...or stop responding...or only half respond...they're going to notice. They're going to, at that point, fill in the blanks themselves, telling the story that most suits their purposes.

And, as mentioned earlier, there are small moves that work in the one-to-one situation; writ larger, they also work in the one-to-

many situation. Potts concludes:

If you get an inquiry that is about something that you cannot get to, that you cannot do quickly, at least say “We were just made aware of this. This is an extremely serious topic. We ask for patience so we can get it right.” (Personal statement, 2018)

11

Selling with Immediacy

Immediacy has made things difficult for some professions. But it has also presented new opportunities to other professions. Sales, in its broadest sense, seems to have evolved alongside immediacy to reach the point where it is today. As such, the section that follows is specifically offered to those readers who are interested in sales and selling.

At one point in the history of selling (ideas, learning, services, products), we went door-to-door. Sometimes we carried our goods with us, sometimes we tried to convince people to place orders that would later be shipped. Often we performed a demo on the spot.

Now, we live and work in a far more complicated way. Sometimes, though rarely, we go door-to-door. Often we go screen-to-screen. Or face-to-face-to-screen.

We have sold in the same era where presidential debates were run face-to-face, and in parallel via websites and social media platforms.

Where people showed up for the game but stayed for the commentary.

Where the primary source was sought, but the secondary source was sometimes coveted or paid attention because it offered more of the story, more of the context.

As a seller (of ideas, learning, services, products), we have to be willing and able to juggle multiple learning conversations, across multiple platforms. We have to be in all of them, all conversation streams.

Or rather, we only have to if we want to catch the proverbial fish, which jumps from stream to stream with ease and abandon.

Tip

For sellers: Pay attention to how the sales moves in real estate have evolved. Drone photography became increasingly popular in commercial real estate marketing demos in order to show clients angles of a building that no unaided human eye could see. Three-dimensional design tools are both accessible and advanced, allowing any motivated agent to create and show what a space could look like based on their knowledge of what the customer might want. Consider ways that you can use technology to show people new angles on the service or product that you wish to sell them.

Use Feedback to Extend Your Platform

Sales, too, can be enhanced by the deepest underpinning of immediacy: feedback. We have more to wring from it before turning our attention elsewhere.

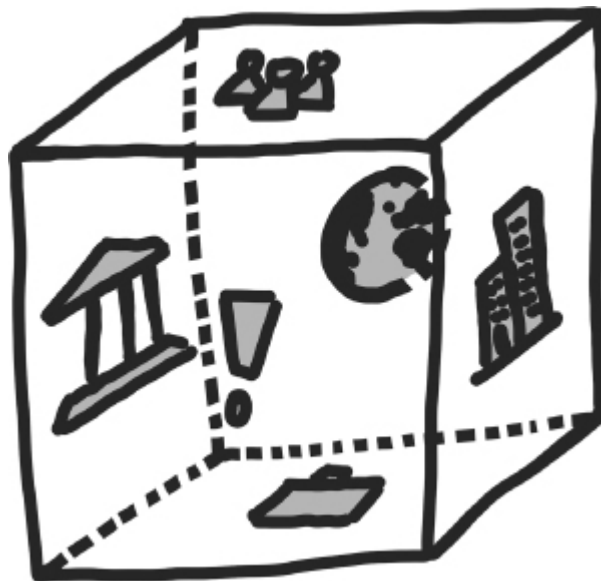
First, as has been mentioned, feedback is optimized when it arrives in the right dose, at the right time. We have all had moments where we were simply not ready to hear what was good for us and so swatted away crucial lessons. On the other end, we have all delivered feedback at the wrong time, pushing our recipient into a defensive posture, again minimizing the impact of the lesson.

Second, and also crucial, is that feedback, done well, helps both the receiver and the giver. Not all feedback is good feedback; not all feedback is equally valuable; not all feedback will result in learning (Hattie, 2012). So you can't just throw it around like fertilizer and expect all the weeds to die and all the plants to, in turn, flourish. In fact, one of the most valuable aspects of good feedback is the effect that it has, to continue the metaphor, not on the weeds and the plants but on the thrower of the fertilizer – you.

Taken together, these pillars of effective feedback – dosage, timing, and reciprocity – help us to notice the value of an immediacy at play in businesses that rely on multisided marketplaces, bringing to a fine focus much of what we have been discussing in this book: leading, selling, training, and servicing. If

a company were to identify a way to get in the middle of the feedback that flows between two parties, helping each side to benefit in a way that they couldn't without the middle-ground platform, then a business serving a multisided marketplace would be born (Evans, 2003).

We studied our first multisided platform and marketplace when we interviewed Jason Chicola, the founder of Rev. Chicola didn't set out to build a transcription service that would serve journalists and writers and television producers. (Rev also handled closed captioning.) He set out to answer an entirely different question: "How do we create jobs where people will work from home?" (Valentine, 2016).



Years later, as the company continued to improve and add marketshare, Chicola and his team paid attention to the customer experience, without question, but they invested a lot of time improving the experience for their freelancers, too. The platform, Rev, gained in value as it made the transaction between customers and freelancers more seamless, more immediate, more delightful.

Inputs, requests, outputs, tweaks, modifications: all pointed to a world where the customer received information at the time when he or she could best make use of it, and the customer's interactions within the ecosystem sent important data back to the producer on the other side to then make adjustments on her end. A good immediacy system: it's like an endless game of tennis, one that serves both the server and the served, allowing for a deep commitment to iteration, to adjustment. The platform is the court and the net. And the platform might even go so far as to provide

continually improved racquets and balls, water between sets, perhaps a rabid crowd to motivate the players. It hosts the game, really.

Though that analogy started to get a little bit out of control near its end, it is really not too much of a stretch.

We really stretched when we spoke with Owen Jennings, product manager at Cash App, a service that, among other features, lets its customers send money to one another and order a free customizable Visa debit card to spend their balance. Boost, a product launched in May 2018, allows customers to receive instant discounts on that debit card. So, for instance, if you swiped the debit card at a Chipotle, and had selected the Chipotle Boost, you could immediately receive 10% back on your card. Jennings and his team are building a classic multisided platform where the customer receives the discount, the business receives customer acquisition and retention benefits, and Cash App gets the engagement and growth benefits of being “the card for a certain business” (e.g., The Lyft Card or the Chipotle Card).

According to Jennings, “Immediacy was the thing that was at the top of mind when they were building Boost.”

It allowed him to see a competitive advantage. Some companies, even some of the major players in the industry, had simply not seen – or found a way to leverage – immediacy. If you think of Boost as a rewards program for Cash App and then put it up against other rewards programs, you can see the immediacy play clearly. According to Jennings:

The way that the card offers landscape works right now is that there are basically three models, and one of them we've kind of invented.

The first model is credit cards. You accumulate points over time, and after you've accumulated 137,000 points you can go and trade those points in for a certain benefit at an unknown or at least obfuscated exchange rate. So you can take your 137,000 Chase Sapphire miles and buy a plane ticket and that plane ticket costs 50,000 miles and maybe last week it cost 30,000 and next week it will cost 80,000. No one really knows.

Or, the other model is with card-linked offers. There are all of these apps that do card-linked offers where you put a credit or debit card that you have into the app, and it gives you offers. If you guys use Uber, there's Visa Local offers in the Uber app. So if you link your Visa card to Uber, they'll say, "Hey, there's a Thai restaurant near you, get 10% off." The way that works is, you link your card, you make your transaction, and then there's a statement review, 7 or 30 days later, that says, "Did Owen make a transaction at Lemongrass Thai? If yes, then give him a credit back to the account a week later or a month later." That experience is not optimal, I think, mostly because it's not immediate and so you're not engaging with your customers at the right time. That was one of the things that we wanted to fix. (Personal statement, 2018)

Of course, the "fix" is similar with feedback and students. Timely feedback is key. It can be used to cause the right adjustment at the right time, to benefit the student, helping her do her work better, and the teacher, helping her do her job better, and the school, helping it to meet its mission better. And the key hinge is really feedback and assessment and most likely formative assessment, in the moment, when the stakes are low.

And so, the experience with Boost is that you add a Boost to your card. Right, so you put the 10% off at Chipotle on your card, and when you go to make a transaction for \$10, you're actually only paying the discounted amount. So you can think of it as an instant discount or instant cashback. We've toyed with framing both of those for marketing perspective. But we're giving you the benefit right then and there.

The difference between getting a dollar off your coffee, everyday, instantly, at the point of purchase is totally different than saving up points for a month and then trading them in for \$3 and getting that credited to your account a month later.

We've rolled out a debit card, and it's among the fastest growing debit cards in the US right now, and part of the reason it's so attractive is because if a friend pays you \$50 to split dinner, you can then spend it instantly. So the entire concept around Cash App is instant, because people need instant access to their money. That's less conceptual about how people interact with each other and more like an artifact of the fact that people need money now. (Jennings, personal statement, 2018)

The transaction, being more immediate, is also good for brands. If a credit card company has to complete a statement review that takes, say, 30 days, before offering something back to clients as reward for shopping at a certain place, that certain place loses the impact.

If you're giving the discount 29 or 37 days later, the customer has already completely forgotten about the transaction, they're never looking at their online banking statement, they're never seeing that Uber gave them that benefit. And so there's no brand recognition improvement and there's very limited customer acquisition and retention benefit, it's just something that happens in the background.

Boost used the tools of immediacy to make a deep impact. Text message, push notifications, information-rich receipts, sounds: "There's a whole experience that says, 'Hey, you just got a dollar off at this coffee shop.'" (Jennings, Personal statement, 2018)

But they did not stop there. Most people and businesses can access those things, can use those things, but like a good multisided

platform, Boost realized that it had to develop a better instrument (a better tennis court, racquet, ball, crowd) if they truly wanted to influence the quality and joy of the game for its participants.

Every other company is basically taking your PAN (primary account number, your credit card number) and matching it to a MID (which is a merchant identification number) and then ad hoc saying, oh yeah, give them a dollar, a week or a month later. We, however, built our own proprietary merchant graph so we know who our merchants are and can therefore apply an instant discount – a Boost – in basically real time. No one else has done this. No one else is offering instant discounts like this. (Jennings, personal statement, 2018)

Boost's example may be tough to duplicate in its details, but the model it suggests is broadly applicable. The most attainable insight from Jennings' story is simple: consider tightening feedback loops between a company's agents and a company's customers.

For example, in typical sales motions, it might be hard to resist the urge to call up a customer who has not yet signed a purchase agreement and has not responded to your follow-up emails. The problem is that either the agreement is not a priority (i.e., the prospect is weaker than you thought) or the communication approach was flawed from the start in trying to get that document signed. If the customer was indeed interested, while you have him or her on the line initially, you could send (and confirm receipt) of some calendar events that will serve as landmarks or beacons in the closing of the sales process. Those alerts would then pop up (for him or her or for his or her assistant), helping to prompt a kind of response based on an initial commitment. If the person declines that option, he or she is declining a situation wherein both customer and seller would receive information at the optimal time, signaling that he or she may not ever have been that interested in the sales motion.

Or, if you supervise a team that frequently gives estimates to clients, insist that they write up their estimates and send them to both the potential customer and someone in the central office who is tasked with following up within a set amount of time. Critically, the follow-up should happen with both the customer and the worker, so that neither loses track of the potential project. You could certainly build an automated system that sits in the middle

of all of these people and flags reminders, but you can also run your reminder system through a simple calendar book and an organized and efficient office manager.

12

Getting Immediacy Right

To close, we will return to our narrow road on Bainbridge Island. If you think of the road as your focus, or your client or customer's focus, then the analogy becomes clearer.

There's only so much room on the road. But, if we're in that place, we need the road to get to where we're going.

Regardless, if too many cars are barreling down the road or up the road, collisions, or cars driving off cliffs, would be inevitable. The road would become useless.

We imagine that the urban planners of Bainbridge Island figured out a compromise. If you're driving down the road toward a home on the bottom and a car approaches you from the bottom, you have to wind your way, in reverse, back up the road.

The problem-solving wisdom of Bainbridge Island serves us well as we recollect the lessons of immediacy. You may want to provide something to your customer right away, but your customer may not be ready to receive it. Someone may have feedback for you, but if you're in the middle of a stressful stretch of work, you might want to delay its delivery for a few days. Sometimes it's your turn to use the road. Sometimes you have to hold off. What's critical, for immediacy to flourish, is to resolve issues by thinking about eventualities before they happen. To work out solutions, pass them around, and test them in the real world. Get what you need, when you need it. Give others what they need, when they need it.

When is the right time to call a meeting with someone?

When should you put in an automated intervention to remind people about company norms or protocols?

When should you offer feedback?

When should you build a platform to connect members of your network or community, clients, and so on?

When you work these things out in advance (like the citizens of Bainbridge Island), when you try to minimize deeply disruptive

interruptions (like collisions or arguments on mountains), you allow people to do what they do best ...

You give them the kind of optionality that can lead to delight and keep them on task, even when there are too many cars on too little road.

As we move forward, remember the people of Bainbridge Island. They manage their most dangerous and cluttered roads with grace and even joy – it's part of life on the island, not a have-to but a get-to, not a hassle but a charming opportunity to solve the kinds of problems that happen when you have the ingenuity and wherewithal to build houses in the wake of glaciers.

MAKE YOURSELF CLEAR WITH IMMEDIACY

Good teachers always consider the point of need for when their instruction will be most impactful.

What a seller-as-teacher can do ...

Consider “glance media” as a way to instruct, knowing the intended audience may only give fractions of a second of initial attention to the message you are sending. Think of a billboard (Duarte, 2018) and how it can get a memorable message across with simple wording, clean design, and a specific purpose. Now consider an email and the way your audience might receive it. What do you put in the subject line so that it “stands out” among all the other inbound messages that people receive? Furthermore, in only a few words, how do you also signal that your message is coming from a real person and isn't generic? Here's an easy one: try using the possessive adjective “our” to describe any shared interactions (e.g., “following up on our conversation,” “looking forward to our meeting”).

What a trainer-as-teacher can do ...

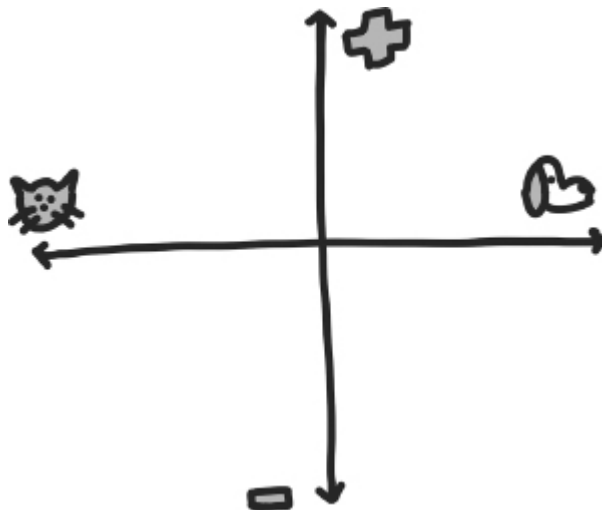
Think of how esoteric, procedural instructions can be accessed by those who need them at the point of time when they need them (Tufte, 2018). Consider the washing instructions on the label of a piece of clothing (e.g., dry-clean only) or the lines on a measuring cup (mL and cups). The latter is an example of information that is not worth memorizing or developing the perfect skills around (i.e., to pour exactly 1¼ cups of water without measuring). Or think of receipts that have suggested tips at the bottom to give you a ballpark range of amounts. Now think of your meeting invitations: when sending a meeting invitation for a training, make sure the instructions for arriving at, or connecting to, the training are located in the meeting invitation itself and are easy to locate within the message.

What a service professional-as-teacher can do ...

“Explainability is about trust. It's important to know why our self-driving car decided to slam on the breaks, or maybe in the future why the IRS auto-audit bots decide it's your turn. [Whether a] good or bad decision, it's important to have visibility into how they were made, so that we can bring the human expectation more in line with how the algorithm actually behaves” (McTole, 2017). Whenever you are helping a customer solve a problem or address a known service need, you can foster trust by not only explaining the behaviors that the customer is experiencing, but also providing that information at the time that the service is being performed. If you work on site (or lead a team of people who work on site), use pictures and videos to document what you are seeing and what you will be doing. You are the expert – otherwise the customers would not have needed you there. Teaching them will not give away your secret formula (even if they become more competent at solving that particular issue in the future). It will instead give them trust that you will be able to solve novel problems in the future, making you a trusted advisor.

What a leader-as-teacher can do ...

The next time you are leading a team or committee and are facing an “either/or” decision, with some members of the group fervently defending one position and the rest on the side of the other, introduce the concept of the polarity map (Johnson, 1998; Kise, 2012). The goal is to list the gains and limitations of both sides of the argument, while simultaneously creating space for strong position holders to empathize with and understand the others. This exercise in immediacy helps move a group from “either/or” to “both/and” solutions.



PART 3

DELIGHT

Once the search is in progress, something will be found.

- Randomly selected card from *Oblique Strategies*
(Eno & Schmidt, 2018)

13

Identifying the Conditions for Delight

We care about delight, and are devoting the final section of this book to it, because it is in some ways only possible when authenticity and immediacy are well tuned and coordinated. It helps to understand them first. At the same time, delight is a dimension of experience comprised of many of the intangible ingredients of good teaching and learning – the peak of good teaching and learning, by some definitions. In situations that require us to understand others and increase their understanding, sparking joy, genuine curiosity, and intrinsically motivated persistence will always be more useful than leveraging fear, lack of relevance, and routine.

Though easily fumbled, delight is fully worth pursuing (we'll explain *why* later). And though it often scans as play or serendipity, the implanting of delight in a product, service, or experience often requires immense skill and thoughtfulness, the timing born of immediacy, and the human touch born of authenticity (we'll explain *how* later, too).

But first, let's return to our pattern of introductory metaphors ...If you've been following the extended metaphors in this book so far, you've played – at least mentally – on the seesaw of Authenticity and navigated the narrow, winding road of Immediacy. In this last section, we're going to ask you to consider, as metaphor, an image from a poem by the poet Rainer Marie Rilke (1875–1926).



In his 1918 poem “The Archaic Torso of Apollo,” Rilke writes about a statue of the Greek god Apollo. The important thing to know about the statue, at this point, is that its head is missing. As a result, in the poem, Rilke, or rather, Rilke's speaker, focuses on the statue's chest, shoulders, torso, and legs. Apparently, they are quite spectacular. They convey a rare power, drawing in the viewer even though he or she cannot, as the opening line imparts, “know [that statue's] legendary head / with eyes ripening like fruit.”

After describing the statue and drifting into territories both philosophical and psychological, the poem ends, famously, with a direct address to the reader: “You must change your life.”

As we have invited you to do in previous sections, we invite you now: Use the metaphor – in this case, of a glorious, though headless, statue – as a form of mental velcro, attaching to it your evolving understandings and insights as you read, ponder, look at the illustrations, and complete any other emergent tasks in this section.

Begin Again with Immediacy and Authenticity

Before we fully leave the shores – and twisting roads – of immediacy for the waters of delight, we have to explore some of the downsides of immediacy.

To review, as teachers are wont to do at the start of a new lesson, immediacy in transactions, the kind we promote, occurs when both the actor and the audience feel that they have delivered and received a message at the best time for their purposes. A simple way to think about this is to imagine your own birthday. Imagine that your best friend had to travel on business to a very different time zone on a birthday that he knew was significant for you. Rather than call you at 3 a.m. (his time), he records a thoughtful message for you (at 9 p.m. his time) and texts it to you, telling you to open it on your actual birthday. He has delivered a message at a time that suits his situation and purpose; he has ensured that you will not only receive a message from him but also hear his actual voice; assuming you follow his instructions, you will receive the message at a time that makes you feel special on your birthday. With the right forethought and care, immediacy can strengthen relationships, happening for both the deliverer and the receiver at the optimal time.

In the wrong hands, though, forethought can quickly become sneakiness; care can quickly become selfishness or even malice; and the power in a relationship that should be mutually fulfilling can tip off balance toward one side or another.

One time, a computer application that both Steve and Reshan had used in the past – and shared with hundreds of students and teachers over the years – initiated a major update. Within that update, the company planted a feature that auto-launched the application every time users restarted their computers. This move seemed a little fishy, especially to people who had not opened the application in weeks, if not months.

As users restarted their machines from time to time, which is a recommended practice, they were then faced with a situation where they had to wait for the computer to load (expectedly) and then the application to load (unexpectedly). Then they had to take a few more seconds (again unexpectedly) to quit out of an application that they never accessed in the first place.

The unexpected steps were the company's way of – to put it positively – serving its customers by showing up immediately for them as they started computing.

These steps were also the company's way of – to put it less positively – forcing its presence back into the lives of users who

weren't using it. Like the readers we mentioned in the Authenticity section, who feel a sense of unease when faced with computer-generated poetry, these former users of the application felt a sense of unease when their needs had been cared for in a manner that seemed sneaky or deceptive – that is, they felt the effects of bad authenticity paired with questionable immediacy.

And in fact, one of the technicians at Steve's school received enough inbound complaints about this unease that he sent an email to the entire community to teach them how to disable the auto-launch feature by going into the settings of their machines and unchecking a box. He taught them how to reclaim their immediacy from a company that had overstepped its bounds.

A few years later, Reshan saw a similar move – bad authenticity paired with questionable immediacy – emanating from beacon technology.

Beacon technology (built on low-energy Bluetooth proximity sensors) was starting to make some inroads in a variety of settings based on its low intrusiveness and the way it would load efficiently.

Reshan paid attention when he saw this technology used in a conference setting, where the service provider inverted the use of the technology, placing phones (connected to some bigger back-end systems) in fixed locations and putting the beacon on the badges of conference participants.

At this conference, Reshan observed firsthand as all participants became part of a tracking system that they didn't know was actually in place and as some, especially those involved with cybersecurity, blogged about the extent of the data and privacy exposed as a result of this fully networked, fully immediate experience.

While well intentioned, the delivery and communication of such a system was not well executed. This kind of unwanted immediacy, devoid of authenticity, causes people to fall off seesaws.



Immediacy has its fair share of bad, at worst, or uninformed, at best, actors. These people, wittingly or unwittingly, use its playbook to share information when it suits their own purposes without taking into account the needs or desires of their audience. Imagine the same friend previously mentioned sending you birthday wishes three months in advance because “he had a few minutes and wanted to get the message off his plate.” Or imagine him showing up unannounced on your actual birthday and insisting on throwing you a party when you were already on your way to another party. These actions might be well intended, but they are also examples of ineffective immediacy, most likely decreasing your delight.

Tip

For all readers: Consider auditing the ways in which your product or service shows up in the lives of your users, especially if some of these “intrusions” are automated. Is the engagement rate high enough to justify any negative associations that might be developing in the minds of your users when they think about your product and service? One of Steve's least favorite intrusions, for example, comes from an invitation-only social network that insists on calling him “Stephen J.,” usually in the same email in which they are inviting him to an event that could not possibly interest him. He wasn't surprised when he mentioned the name of the company at a social event with actual friends and they all had a good laugh at the company's expense – they, too, had received oddly configured emails trying to pass as personal invitations.

Identify Those Who Are Bored or on Autopilot, Frustrated or Fearful

We think it's safe to say that information, products, services, experiences, and solutions will always continue to exist abundantly for audiences, and that those that “stick” will do so because they not only address a lingering issue but also add or create new value for the audience. Our sense is that problem-solving became commoditized, leaving value-adding – still a Wild West of sorts – ripe for innovation.

As painful as it was for us, and as ironic in a section about delight, starting by looking at examples where immediacy sabotaged delight before it even got started is crucial to understanding how to move learner-practitioners toward it. The truth is, delight – and its joy, curiosity, and intrinsic motivation – is often extinguished before it even gets started. It requires extra effort and can be quickly doused if pursued by a shortcut, hack, or end-around. And it has several imitators that are much easier to achieve but, like a sparkler on the Fourth of July, fizz out quickly, leaving the darkness much darker than it seemed before the flash of novelty came and went.

We've noticed that delight often starts for people who are in a neutral or negative state. They are either on autopilot (at best) or bored (at worst), either frustrated (at best) or fearful (at worst). On autopilot or bored, for example, they select a new program to watch and it doesn't just pique their curiosity, it ends up giving them a completely new way of seeing the world and their place in it. Or, another example, fed up with a work culture that is toxic and allowed to be so, they find a new job in an environment that supports their growth, encourages them to take risks, and rewards them by giving them partial ownership of their most innovative products.

Delight is often just an invitation to participate followed by the kinds of feedback loops that encourage additional, deeper engagement, and ultimately, transformation. That's why we don't see any of the previously mentioned neutral or negative states as downsides or risks; we see them as opportunities to begin again, to pivot into a pursuit of meaning.

Take it from two people (Reshan, Steve) who have faced down hundreds of ninth-grade students on dozens of Monday mornings at 8 a.m. It is easy, even for the noneducator, to imagine the combination of slouched, eye-rubbing, yawning, foot dragging, reluctant figures that roll into a classroom after a weekend's hiatus. Throw in some unpredictable adolescent hormones or some emotionally fraught car rides into school, and you have a recipe for disengagement.

Or, as some teachers would think, a great place to begin, especially if you're committed to delight.

What is delight? Delight is adding value that is noticeable, that is generative, in an experience or exchange. Moving beyond mere novelty, it offers added value on top of all the alternate ways that an experience could have happened. That value has to be lasting, such that behaviors or habits begin to be influenced or even changed.

When it comes to principles that underpin delight, knowing your learner, knowing your audience really well (often via some kind of preassessment) helps you to craft delightful experiences in an authentic manner.

To delight, consider designing for understanding or working backward from a depiction of a delightful moment. If the goal is to provide lasting satisfaction and intrinsic motivation, then your design will be very different than if your goal is simply to get the job done, or close the ticket, sale, or deal.

14

Offering Choice

Although Steve works as a school administrator at this stage in his career, the reason that he got into the education racket in the first place was because of his love of literature, writing, and teaching great books of all shapes and sizes to young people.

When he himself was young, younger than the students he has taught, though, it took him a while to fall in love with the kind of reading he was asked to do in school. Partially, this delay was caused by the fact that the experience of reading in school was asymmetric to his experience of reading outside of school.

In school, he was asked to read books that his teachers selected and split up into digestible chunks, regardless of whether or not these digestible chunks ended in the middle of the action. He was then told, under no uncertain terms, to read one chunk at a time, whether he was interested or not, a fast reader or a slow reader, and then was judged on his ability to recall information – sometimes picayune details – about those readings.

Outside of school, he read in a different way; he read, as if under a spell, the books that spoke to him. After browsing in his town's library and finding – often by chance – books like Shel Silverstein's poems and Poe's short stories and the Hardy Boys, he read. And read. He read in big, unbroken, unbalanced swaths of time. He smuggled the books he loved into restaurants and churches, annihilating entire afternoons, not so much devouring as himself being devoured. Mastery of the details was never tested; instead, it was utterly complicit in the spellbinding. The closer Steve read, the more he understood detail and nuance, character and setting, symbol and metaphor, conflict and resolution – the deeper the spell, the more complete the experience.

If anything, and sadly, his at-home reading worked against his in-school reading. He knew what he wanted reading to feel like, and when it didn't feel that way, he resisted. He became reluctant and disconnected, and expressed his frustration in ways that led teachers to quickly slot him into a negative category.

Choose Your (or Their) Own Adventure

Fortunately, he did not stay in that state forever. In sixth grade, he reached a turning point. It was not that he finally had the chance to read a book that he loved in school or attend a certain kind of school. On the contrary, he finally met an assignment that was seemingly designed solely for his delight by a teacher who, in hindsight, oversaw masterfully the educational variables at play.

The assignment started with a trip to the school library and a simple invitation: pick any book you want to read, then take it home and read it.

As he wandered the stacks, touching the spines of the books, opening a few to sample some sentences, examining covers, he was, for the first time ever in school, reminded of his nonschool reading experiences. He realized that his school had a space just like the library near his house, where he could easily spend a whole afternoon browsing, pulling books down, and only leaving because someone, ringing a figurative dinner bell, came to find him.

Finally, school was nearly symmetrical with his authentic reading life. He wandered through the school library a little longer than he should have and found a book unlike any he had ever opened or read. It was a Choose Your Own Adventure book. What was this? He grabbed the book, thinking it might be some kind of mistake, checked it out surreptitiously, and hurried toward the door, afraid that someone might take it from him.

Later when he got home, he kept hurrying – right by his beloved basketball hoop, right by the refrigerator filled with delicious snacks, right to his room. Door closed, he dove in.

Now, if you know these books, you know that they offer a choice at the end of each chapter. Do you want to go left or do you want to go right? Do you want to follow this character or that character? Here are the choices offered at the ends of some of the chapters from one of the classics of the genre, *The Cave of Time* (Packard, 1982).

If you continue toward the ranch, turn to page 8.

If you go back into the cave, turn to page 10.

If you seek shelter, turn to page 6.

If you brave the freezing wind to see more of the world about you, turn to page 16.

If you decide to break the egg open, turn to page 72.

If you keep it in your closet until you have a chance to get scientific advice, turn to page 103.

After finishing the book – or, rather, one version of the book – Steve was so enthralled that he started reading it again, making different choices this time. The choices at the end of the chapters propelled him forward, melting time in the process. And, though he was reading quickly, he was committed, as deeply as he ever had been, to reading for comprehension. The deep joy of this particular book was enhanced by his grasp of the details and the nuance of the text. The choices awaiting him at the end of each chapter, that pulled him forward, were more delicious if he brought to them a firm grasp of the details and nuance of setting and character, of symbolism and metaphor. He reread if he had to, the better to make the next big choice.

A look at some research on Choose Your Own Adventure (CYOA) books tells Steve, the teacher, why Steve, the student, was so drawn into CYOA. According to one study, done by a teacher, these texts can improve reading fluency and comprehension in part because they draw students back into the text, multiple times, helping them to practice that act of reading itself. So, to extrapolate a little, instead of encouraging teachers to teach reading by offering their students descriptive lessons, prescriptive strategies, or graded assessments to point out all the ways in which they did not read well, there's a better way, a more delightful way: to help students actually perform the act of reading more often. According to the researcher, and so extrapolating less now, CYOA books aid reading instruction not because they help the teacher but because they create student readers “propelled by making a choice in reading” (Hoffman, 2016). They push readers forward in, and into, their reading.

We call such a move delightful because it adds value by increasing understanding and by sparking joy, genuine curiosity, and intrinsically motivated persistence. As you'll see, adding delight to

typical tasks, services, or products can have a deep impact on the way in which people engage with your work or their work.

Tip

For sellers: When trying to set up an appointment with a customer, don't just ask them about when they might be free. After telling them that you'd love to update them on your product, for example, present them with the choice to either (a) schedule a meeting with you or (b) watch a video. Though they might choose the second option and not actually watch the video, the fact that they had a choice might preserve or strengthen the relationship. If you don't sell something to them this time around, you might at least have earned another chance to pitch them. You can't always close the sale, but you can always find a way to keep a relationship open.

If you want to read about how podiatry students in Australia improve their decision-making by considering CYOA options, keep reading ...

If you want to read about how a former lawyer and VP of human resources uses interactive drama, a form of CYOA narrative, to train leaders and coach teams, turn to page 145

If you're interested in taking a deeper dive into the research underpinning the power of choice and intrinsic motivation, turn to page 147

Or if you just want to hear about how Steve did on the debacle of an assignment that followed his reading of the CYOA book – yes, that story is not over – turn to page 150

Tip

For trainers: Think about the last time you rushed through and “covered” your prepared material. The information was delivered at speed, but possibly faster than any person could thoughtfully process. Who is served well by that? How much guidance and choice is provided, whether it was a live session or something created for self-paced consumption?

Mimic the Real World

Choose Your Own Adventure texts do not only show up in libraries and the hands of impassioned young readers or nostalgic adults. Writing in the journal, *Medical Education*, Kelly Wilson-Stewart chronicled the way “nonlinear narrative” helped a group of podiatry students overcome some performance anxiety, with which it is fairly easy to empathize (2017). In Australia, podiatrists can request X-rays, but as part of their course work, they are also made aware of the dangers of certain X-rays. To X-ray or not to X-ray, that is the critical choice point. Designing for real-world application requires, to a certain degree, real-world practice.

According to Wilson-Stewart, designing a Choose Your Own Adventure style lesson for students helped them to engage deeply, practicing in a setting that “closely mimics professional practice.” The CYOA element of the practice is what made the difference because students were offered several choice points along the way.

The role-playing game allowed students to navigate through a number of viable patient clinical indications. This was followed by choices regarding the outcomes of the patient's functional assessment, and finally there was a selection of possible X-ray series. Depending on the path chosen by the student, personalised feedback was given as to why their nominated series was correct or incorrect, along with detailed substantiation. (Wilson-Stewart, 2017)

Though the choice described in this experiment differs from the kind of choice given to young readers at the close of a CYOA chapter in a book, it still proved to be both engaging, and perhaps more important, to allow authentic and delightful practice to

occur. It's authentic because it is deeply concerned with both the practitioner and the person with whom the practitioner will ultimately interact; it's delightful because it's a game that people want to keep playing.

If you want to read about how a former lawyer and VP of Human Resources uses interactive drama, a form of CYOA narrative, to train leaders and coach teams, keep reading ...

If you're interested in taking a deeper dive into the research underpinning the power of choice and intrinsic motivation, turn to page 147

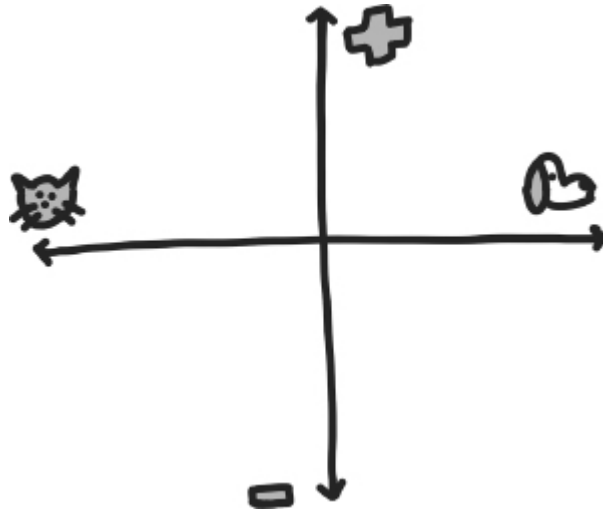
Or if you just want to hear about how Steve did on the debacle of an assignment that followed his reading of the CYOA book – yes, that story is not over – turn to page 150

15

The Power of Engagement

Another example of practice that engages people and builds their understanding in ways that most directly mirror real work came from Performance Plus, a company that used drama as a training tool, and according to its web page, has a client list ranging from Citibank to Condé Nast to Cornell University (Steed, 2005). Though we are now drifting away from the essential structure of a Choose Your Own Adventure text, this example holds true to some of the principles underlying such a structure: the audience selects a path, applies learning to make choices, and ultimately is asked to invest deeply in an experience that, quite possibly, could change them.

Writing in *Journal of Business Strategy*, Robert Steed, cofounder of Performance Plus and formerly a lawyer and HR professional, sounds a lot like a teacher composing a lesson plan. The theater-based training that his company offers attempts to “affect the learning of program participants.” He knows his training works if “the minds of participants in a program are opened to new ways of thinking, whether they can experience their reality in a new way, whether they can incorporate both head and heart, both mind and feelings, in resolving issues” (Steed, 2005, p. 52). In a way, then, he wants to equip them to become aware of the choices that are present in even the smallest of interactions; he wants to open the very possibility of what is sometimes called polarity thinking – that an either/or dilemma can often most authentically be solved by converting it to a both/and.



Any teacher would be satisfied – thrilled even – with that outcome, one where his or her students emerged from a lesson with a more complex, more complete view of reality. The path there, for Steed, begins with dramatic reenactment wherein members of his company perform in front of a team for which they are consulting. In their performance, they each take on the role of an actual person in the audience. This move allows the audience members – that is, clients – to see themselves as if in a mirror.

But – and this is the critical step – the next phase asks the audience members to look through the mirror as if it suddenly became a window. They literally interact with the performers, who remain in character. The audience, or trainees, in other words, enter the adventure, ask questions, and exercise agency and choice as they drill down into the meaning of their own actions and behaviors. According to Steed, again sounding like a masterful teacher, “the interactive process enables the program to belong to *the participants*, not the leader or even the company, and the learning becomes much more meaningful and memorable” (2005, p. 50). They learn for the same reason Steve learned when he stumbled upon a Choose Your Own Adventure text – because the experience was personal, relevant, and drew him into a deep level of engagement. He had to offer some of himself, as do Steed's clients, for the spell to stick, spread, and ultimately become something that he owned permanently.

If you're interested in taking a deeper dive into the research underpinning the power of choice and intrinsic motivation, keep reading ...

Or if you just want to hear about how Steve did on the debacle of an assignment that followed his reading of the CYOA book – yes, that story is not over – turn to page 150

Deepen Their Experience

The varieties of practice referenced thus far in this section all seek to tap into a critical part of each practitioner: their intrinsic motivation, which is a key driver of outstanding performance in places as diverse as the kindergarten classroom, the church, and the operating room.

In his oft-cited book, *Why We Do What We Do*, Edward L. Deci shares a quotation that helps us understand this elusive and powerful part of our nature. Robert Henri, a person Deci considers “perhaps the greatest American art teacher of the twentieth century,” described making art in this way:

The object of painting a picture is not to make a picture – however unreasonable this may sound. The picture, if a picture results, is a by-product and may be useful, valuable, interesting as a sign of what has passed. The object, which is back of every true work of art, is the attainment of a state of being, a high state of functioning, a more than ordinary moment of existence. (Deci, 1996, p. 21)

Henri's proposition really is unique, an unreasonable articulation of deep reason: paintings are precious, but painting, the activity itself, is the true painter's *raison d'être*. The point is the path itself and how it is travelled. The point is attaining a flow state wherein the participant is able to concentrate fully and offer to the task his or her peak skills and understandings. When that state is attained, we've heard, time melts and master players see in slow motion, block out the noise of the crowd, and exist at the highest echelons of their crafts.

Deci cites the passage in the middle of a chapter called “I'm Only in It for the Money.” You can probably guess that the title is deeply ironic. It's a setup. Being in something only for the money, only for the reward, according to Deci, is a sure way to thwart high performance and shatter internal motivation, the fragility of which he calls at another point “quite haunting” (1996, p. 21).

Many students experience a golden age of learning in the time before they receive their first grade in a new class. Once they receive a grade from a teacher, though, usually within the first two weeks of a class, everything changes. They receive stray signals that curiosity and passion might not lead to what a teacher is actually counting. The attributes that we desperately need to build up in each generation of learners might not, in other words, be connected, in the minds of those learners, to their grades.

When internal motivation is lost or abandoned, according to Deci, it takes other things with it. It takes, too, our “vitality” and our “excitement” for certain tasks. We have seen this again and again in schools. It would take an enormously centered and self-confident young person to choose delight in that case instead of the external reward of a grade. A grade, after all, supposedly ensures success at the next level, and the level after that. It ensures admission and pads resumes. And, from a teacher's perspective, grades are also used as tools to assert control.

Which means we have reached an important foothold.

Many adults look back on their educational pasts with at least some degree of scorn for the ways in which they were graded and sorted. The ones who earned very high grades and seemingly benefited from the system will sometimes say that they “knew how to play the game” or just “grinded it out.” They rarely say, grades were good because they allowed me to pursue my interests, enhance my strengths, and generally become a creative and autonomous person. The ones who earned low grades, too, rarely cite grades themselves as a motivator. If anything, low grades work to cut off learning that is only flowing at a trickle with which to begin.

Sellers, trainers, service professionals, or leaders should take note, though, because it is quite possible that you operate in a world where you, yourself, dole out something akin to grades in a way that shuts down something akin to learning. It is quite possible, in other words, that you are sidestepping your client's, customer's, or team's curiosity or intrinsic motivation. As a result, you are missing the chance to enact meaningful change in their lives and in your business.

We'll give Deci the penultimate word. Meaningful change, according to his research, comes when people “are ready to enact a

commitment each moment.”

Tip

For leaders: Performance management is part of the rigor of most businesses. Here's a way to think about it with a teacher's mindset: if the attention of the evaluated employee is placed simply on the score earned on a performance report, the impact to his or her salary, and/or stakeholder feedback, then the process is equivalent to a bad grading system. Attention should be placed on goals, current state, learning, and a plan for helping the employee to make adjustments and move forward. Done well, the results –which were not the focus – will positively correlate with improvements in salary and colleague impressions. But those results depend on the employee's genuine intent and his or her ability to move forward in relation to goals. The choices leaders make about performance management, and the signals that they send about it, will affect the ways in which employees engage with the process.

The last word, then, is this: meaningful change happens for others when a teacher, a leader, a seller, a service professional, or a trainer commits to their true delight. Solving someone's problem does not guarantee meaningful change, nor does handing them a certificate, closing their file, or offering them a bonus. On the contrary, if you want them to keep showing up, if you want them to continue to vote for you or your product, then you have to add value, the kind that elevates or deepens an experience for a participant, to their lives.

Choose the Uncommon Way Forward

In schools, many ambitious assignments (by teachers) and noble efforts (by students) often end with a crass question: What did you get?

Similarly, as adults in a business setting, the question continues with only a slight variation: What did you get paid? Or, what will I get paid? Or, if I do this, what will I get?

We end up forcing ourselves, and people about whom we care, away from and off the path of intrinsic motivation. By asking about the reward, we elevate the reward to prime mover status. By asking too often about the product, we look right past the process. Unknowingly, ironically, we compromise our own potential.

Regardless, if you were to ask Steve what he got on the assessment tied to his Choose Your Own Adventure book – again, that's a common question – he could not tell you. He completed an assignment but never registered the grade that the teacher ultimately levied on that assignment.

When he tells this story, he likes to say: he doesn't remember what he earned as a grade on the assignment, but in some ways, he pulled a life out of the assignment. (Leaders, take note: some assignments can be life changing. Have you designed any lately for your team members?)

Some experiences belie the categories we invent to contain them and slip right past the questions, even well-intentioned, that may minimize them. By the time he turned in his book report, Steve didn't need a grade. The assignment itself, preceded by the reading experience itself, preceded by the choice-infused selection process, had given him all that he needed.

Which does not mean the assessment itself was an easy or inconsequential ride. In fact, it was one of the more challenging assignments he has ever had. Importantly, though, he remembers the challenge; he does not remember the grade. Here is what happened.

After reading blissfully and competently for the better part of a week, Steve was struck by a heavy dose of reality when, all of a sudden, his “book report” was due in a mere 15 hours. He wasn't necessarily used to doing well in school, but he certainly wasn't used to doing poorly. He was a good student, good enough to be left alone. But on this night, he faced utter ruin – he didn't even know how to get started. The book report was not an uncommon assignment. In fact, he had completed several in the past and never felt challenged. Usually, he could sit down, write briskly the requisite summary of important events, and move onto something else.

But the problem for Steve was that, at this point, he had read the book multiple times and in multiple ways. He had chosen his own

adventure again and again, always choosing a different door, always choosing a different path. There wasn't one story to sum up neatly in a book report. There were at least a dozen zig-zagging paths zigging and zagging all over each other.

He literally couldn't find the narrative. So, as he was trying to retell the story, he ended up writing a book report about the limits of book reports. He had to explain that there were multiple paths through the book, and ultimately, predictably, the paper turned out to be a little bit of a mess.

But, and this is important, it was one of the best and most memorable assignments he ever completed, because it was deeply personal. He really wanted to explain his reaction to this book to someone who would listen. As he untangled and retangled the book, he learned things about interpretation and analysis that he never would have learned if he were able to simply summarize a story. It took him a step beyond his available skills. He had no literary framework, no toolkit to explain hypertext-style literature, no sense of the appropriate way to approach meta-analysis. He found these tools later, in graduate school, and in fact, it's possible that he only found them there because he had activated a need for them much earlier in his schooling.

Now, in his current role, Steve is as likely to pull out one of Brian Eno's *Oblique Strategy* cards to help unstick a problem as he is to reference Teresa Amabile and Steven Kramer's research on "the progress principle" (2011), one that champions a reverence for the inner work life of employees and the ways in which choice and internal motivation can spark innovation. These sources resonate with Steve, in part, because they trace back to a formative learning experience. Not what he learned, but how. Not the judged output of a process, but the process itself.

So you're facing that class at 8 a.m. Literally if you're a teacher, figuratively if you're in another field. You're facing that cold customer, that eye-rolling trainee cohort, that frustrated client. You're dealing with the bored or the autopilot, the frustrated or the fearful, the person trying his best to avoid engagement. This is a common dilemma; delight is the uncommon way forward.

We won't love all the assignments that life and work throw at us. We won't all want to convert a book we love into a book report. We won't all want to deal with products that break, with services that

fall short, with trainings on underwhelming topics. But when we're in control of these experiences, when we're the ones presenting the offering, we can try to make others feel, at the very least, like Steve, when he was invited into that school library. And at the very most, since this should always, also, be on our minds, we can attempt to change the course of others' futures with the work we put into the world.

The remaining chapters in this section will offer you suggestions – theoretical, strategic, and tactical – for how to move people into a state of delight. If you consider one of delight's most worthwhile outcomes – the generation of a game that people want to keep playing – then you can probably already start to figure out all kinds of reasons why you would want to bake it into your training, your leadership, your service, and your sales actions.

Tip

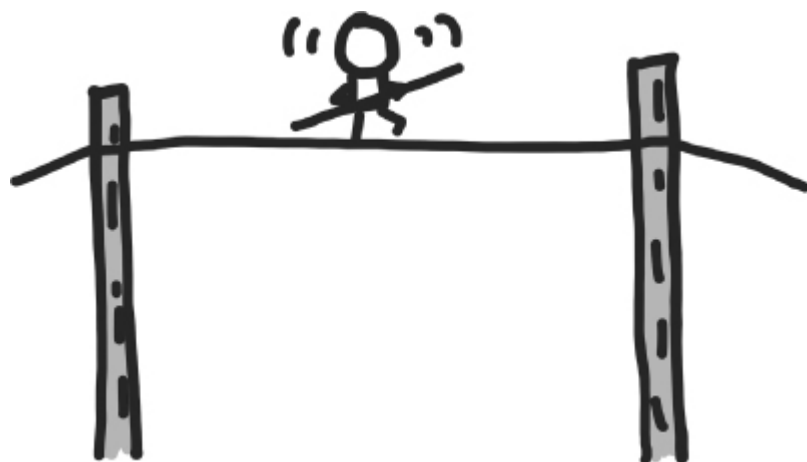
For all readers: Before moving back into the more traditional flow of this section, consider how you felt when we followed the Choose Your Own Adventure model and you were given a choice. Did these choices frustrate you because you were expecting us to direct you and instruct you from point A to point Z? Or did choice interject a feeling of joy in you because you could read the way you wanted to and participate, at least a little bit, in the coconstruction of the book? Or did the introduction of choice relieve you a little bit because it actually mirrored and justified the way you read books in an era where everyone's attention is fractured and strained? Or did you have another reaction?

16

Novelty Is Not Your Friend

Imagine that you're watching a tightrope walker. You're watching her walk from one pole to another across a thin wire, occasionally changing speed. Though her wire flexes a little bit, she is light on her feet, almost dancing. By objective measures, that is a pretty amazing accomplishment.

But if you were at a circus, watching this acrobatic person walk across a tightrope, how long would it take for you to turn your attention to the lion tamer or the man who launches himself out of canons? How quickly would you lose interest in the great walker and her impossibly thin rope?



Probably, if you're like most people, pretty quickly. We have seen tightrope walking, either in person or online or in documentaries like *Man on Wire*. In the latter, the film's subject walked on a wire poised, illegally, between the New York World Trade Center's twin towers.

Still, it is worth wondering why you would be distracted away from something that most people could do only at great personal cost – away from something that is actually an amazing human achievement. It is worth tracing the same impulse – to scoff at or ignore amazing, show-stopping, magical performances – across our personal and professional lives. Indeed, we do the same thing with our phones, with our jobs, with our cars, and in our streaming media accounts. We flip from thing to thing to thing.

Sometimes we don't even know what we're searching for or why we're moving on.

We expect products and services and performances that, really, are magical in nature to be second nature to the companies and performers that produce them. We expect the wireless network to work – and quickly. We expect to be able to have a video call with our cousin in France. We expect to be able to move and share gigantic files both within and outside a company. We expect to shop quickly and efficiently with a few gestures and have our selected product show up at our door – and quickly. We expect magic, grow grumpy when it fails, and move on quickly – to another product, another service – at the slightest hint that something is growing stale.

If we are going to understand delight, and if we hope to procure it, we have to begin with the understanding that people in the world, including those within a very wide range of discretionary income, live in a time of relatively great abundance. Whether that means paying for a range of assorted vegetables or accessing, for nearly free, hundreds of high-quality videos every time we want to learn to do something, we live in a time where miracles happen every day.

So now let us switch lenses and think about what it means to be the tightrope walker in such a time. That is, let us think about what it means to perform miraculous work that is very similar to the miraculous work happening in the shop of your greatest competitor, as well as the upstart startup that is just about to enter the scene with a buzzy new product that disrupts your own.

If you are a tightrope walker in the age of abundance, you are one of many. You have solved the same problem – in this case, one involving gravity and balance. To stand out, simple magic – walking along a thin rope – is not enough. You have to add a chair to the wire and then stand on it; you have to hang from the wire by your toes.

Another way to visualize this is to consider a simple line grid. The x -axis is abundance. It goes on and on and on, a litter of options, left to right and back again, as fast as the eye can scan and the head can turn. And it is cut, from time to time, by the y -axis, which is, for our purposes, the axis of delight. It is where, even in a world of nearly unlimited options, you uncover and present something

built on top of unlimited optionality or something dug down more deeply, more meaningfully, than it first seemed. Either way, the *y*-axis asks something of the viewer, of the user, of the consumer. And in the asking, its promise isn't novelty or pure satisfaction. It's something closer to transformation.



The tightrope walker is a tricky example because it could easily plant the wrong idea in your mind. Like August Van Eepoel suggested all the way back in [Chapter 1](#), we need to add a layer – to our explanation, to your understanding – before moving forward.

Going vertical on a tightrope is not a mere feature. It is not a mere gimmick. Hanging by one's feet, bat like, or climbing onto a pole or bicycle (on top of a wire) requires new muscles, new dexterity, and is a new way of conceiving and executing the art. It is a fundamental reinvention of both the degree of difficulty, for the performer, and the investment, in terms of attention, anxiousness, and breathlessness, by the audience. The experience, itself, is different. It makes the audience want to keep watching, keep participating, stay engaged, and after the program, keep talking about the experience. Perhaps, even, it could shift somebody's mindset – when you have been walking left and right on the tightrope of [insert an area of expertise] for years, what would it look like if you started climbing up or down something like the *y*-axis of the rope? What would greater height reveal? What would additional depth yield? Climbing up and down the *y*-axis changes possibility, adds a new limb to an old decision tree.

Remember This Formula: Novelty + Neutrality = Not Okay

When Reshan was working as a math teacher at a school, learning to take his first few steps onto his chosen high wire, he shared with one of his colleagues – a veteran educator and technologist – a story about a powerful experience he had just had. Reshan, a younger teacher, thought he had bypassed mere horizontal movement and possibly supported the reinvention of the artform, going vertical on an early try.

He told this colleague that he had used an open-adventure computer game as part of an approach to teaching problem-solving. His students seemed “fully engaged,” he said, and “hardly made a sound.”

Surprisingly, for Reshan, his colleague was neither surprised nor impressed. Instead he asked: “Engaged as compared to what?”

Years later, with much more experience, Reshan knows that the question implied, of course, that his students were more engaged, temporarily, because he had offered them a deviation from a norm. The “powerful experience” was happening in his own cranium, but not his students'. To know if the teaching method and its learning effects actually had power, staying power, one other question mattered: did the engagement last over time, once the novelty wore off?

A deviation from the norm – even a minor disruption of the default – is enough to grab the attention of an experienced participant. Some might call such a deviation a hook. Others might call it a pattern-breaker. Humans are routine-seeking, pattern-noticing creatures (Piaget, 1936; Mattson, 2011). They pick up when there is a glitch or a contrast. But to chase those moments, to play only to them, is to miss the chance to connect on a deeper level – with trainees, customers, colleagues, and clients.

A good measure of a new tool, a new process, a new experience, is whether the engagement – the intrinsic motivation to continue using that new tool, engaging in that new process, and wanting to be a part of a new experience – persists even as the novelty (the newness) of the thing diminishes.

Or, as one of Steve's uncles from Jersey City, New Jersey, might have said, “There's the thing ... and then there's the thing around the thing. The thing around the thing makes the thing the thing.”

For example and to translate, as kids, when Steve and his brother and sister went to visit his grandparents (also in Jersey City, New Jersey), one of the highlights of the trip was the crusty, chewy Italian bread that they procured at the local bread store. The bread, itself, was not exemplary. It was made of white flour, had a tough crust that could give you near-whiplash as you pulled at it with your teeth and then snapped your head back when you finally snagged a morsel. And then it was chewy as bubble gum. But it came from a particular store from a particular bread baker who always greeted Steve's father like he knew him and always gave Steve and his siblings a cookie on the side. And it came after a walk back to his grandparents' home, where neighbors sitting on porches, too, seemed to know his father and always commented on the loaves sticking out of the crinkly paper sack. The highest quality bread that Steve will ever taste will never taste as good as the subpar Italian bread of his youth, wrapped in the experience that led up to it. The thing around the thing often makes the thing the thing.

Follow Resnick's Roadmap

Less arcanelly, MIT's Mitch Resnick explained the success of his own learning and creation tool, Scratch, in a manner that articulated perfectly the ways in which delight can be baked into products or experiences. It offers a nice roadmap for designers of everything from trainings to new pieces of software to conversations.

First, we see choice points that allow users to follow an adventure that suits them:

A big reason for the success of Scratch is that children can use it in so many different ways: Some create animated games, while others create musical compositions; some create geometric patterns, while others create dramatic narratives; some plan out their projects systematically, while others tinker and experiment. (Resnick, 2017)

Next, we see the option to personalize one's creation:

To make their projects more personal and distinctive, children can import their own images and their own voices. (Resnick, 2017)

There is also no set endpoint, no expert to please. (In fact, the expert – adult – becomes a former expert, returned to inspired and animated amateur-hood by the participants he or she is watching in the Scratch environment).

We design our technologies as spaces to explore, not as collections of specific activities. Our hope is that children will continually surprise us (and surprise themselves, too) as they explore the space of possibilities. (Resnick, 2017)

Important, too, Scratch functions almost like a game that not only can be picked up and played right away, but also one that does not have a clear end.

The design challenge is to develop features specific enough so that children can quickly learn how to use them, but general enough so that children can continue to imagine new ways to use them. (Resnick, 2017, p. 175)

After hearing this description, we might ask ourselves: What is Scratch, actually? Is it the code underneath? Is it the interface? Is it the intention and concentration that each user brings to it? Is it the experience that each user has when working in it? Is it the memory of discovery and aha moments that happened – of learning that happened – when a user engaged deeply with this software? Is it the product produced by the user?

We are not sure, but we do know that thinking only about the code and the product produced – the first and last questions above – would be a gross understatement of the value that Scratch brings to the lives of its users. The extra stuff, the delightful stuff uncovered in those middle questions above, is why people go back to Scratch.

Novelty does not make us want to do that. It wears off. Delight, on the other hand, is the game you want to keep playing. It stacks meaning on top of meaning, burrowing into the depths of a person's identity and function.

Think about a mobile device. If you have one and use it frequently, you are certainly aware of the way features are added constantly in the form of sounds or backgrounds or simply new things you can

do with known apps or the phone itself. But if you were to lose your phone in the middle of a big trip, chances are, you wouldn't miss each individual feature. You would miss the deep stuff: you would miss the freedom of mobility that the seamless mobile device gives to you, the confidence that comes with being able to access a map from anywhere and quickly access directions to any destination, the ability to connect, in multiple ways, with anyone in your network. You would miss, in other words, the *you* that you are when you have a fully charged smartphone in your hand. A successful product – or experience – makes the user the unit of delight. You, only better.

Features and benefits allow you to try on behaviors and postures well beyond your human capacities. But, for them to feel genuine, they have to lead to a transformation inside of you.

17

Boredom Is Not Your Enemy

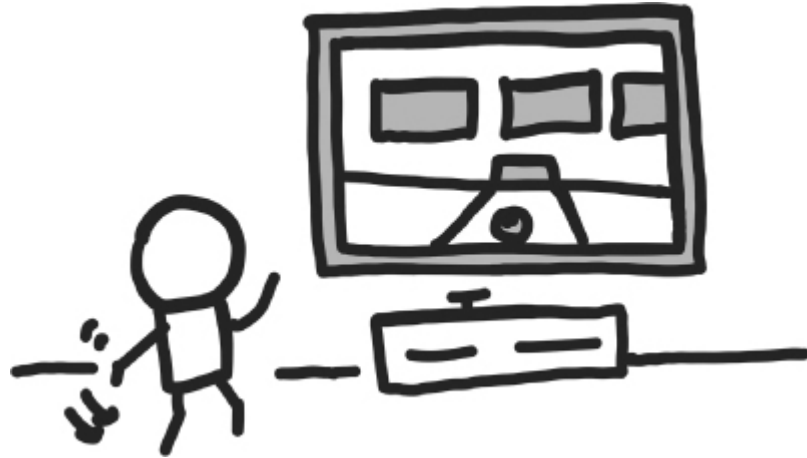
Of the two of us, Reshan is the gamer. He enjoys video games, and has developed a discerning palate based on his understanding of his own learning style and the particular problems he enjoys solving.

The first time Reshan used Microsoft's Xbox original Kinect product (a camera and infrared motion sensor control for the gaming console), he was instantly engaged. He could swing his arm in a bowling motion and the character on the screen would bowl a ball. Interesting. Novel. Fun.

But soon he found that swinging his arm in the air and seeing a visual representation of the motion on a screen was not the way he most enjoyed playing a video game. The game did not become a narrative worth investing himself in continuously; he wasn't motivated to climb its particular levels or talk to his friends about how to approach problems within the game; he did not want to wear the logo of the game on a shirt to tell the world that he was not just a player, but a living, breathing extension of the game, someone who might run back through scenarios while waiting online or chatting with friends.

But why?

For one, as game scholars Katie Salen Tekinbas and Eric Zimmerman might say, the bowling game only offered him what game designers would call “discernibility,” wherein “the result of the game action is communicated to the player in a perceivable way” (Tekinbas & Zimmerman, 2003). Clearly, this game offered plenty of that.



It did not offer him an outcome that was “integrated,” though. Integrated action in a game means that “an action a player takes not only has immediate significance in the game, but also affects the play experience at a later point in the game” (p. 35). Though the game might do that for some players, it did not do it for Reshan; he could not see the through-line from action to later significance. The game could not become “meaningful play” for him. Tekinbas and Zimmerman explain further:

Playing a game means making choices and taking actions. All of this activity occurs within a game-system designed to support meaningful kinds of choice-making. Every action taken results in a change affecting the overall system of the game. (Tekinbas & Zimmerman, 2003, p. 33)

Meaningful choice-making is the key here, and it is quite obvious when an experience does not generate or offer it for a participant. In those cases, the game – or product or service call or training – exists as an end in itself, like a shovel or a robo-call or a training that leads to a certificate, and that's it.

On the other hand, the game can be a beginning in itself: a multiplier, and amplifier, of the player and the player's experience. A shovel that makes you somehow forget that you are shoveling. A training that not only gives you a certificate but also leaves you connected to a network of learners with whom you can continue to interact and from where you can draw support as you return to your job. A robo-call that leads you to a human voice when things get complicated or emotional. An experience – with a product, solution, training, and so on – that allows the user to answer a resounding yes to the questions, “Is this delightful? Will I be able

to be a better version of myself – doing better things – now that I have had this experience?”

Delight is the game you want to keep playing, the game in which your commitment and your personal engagement are critical components. As the designer of such experiences, in the Jersey City parlance referenced earlier, you extend the thing by making it possible for your users to access something around the thing.

Search for Meaning and Help Others Find It

We don't want to give off the wrong impression. Delight may be a game you want to keep playing, but that doesn't mean that a delightful experience will always be easy or easeful. Novelty is easy, but fades. Delight can be easy or hard, but it stays. And it's the “or hard” that we need to focus on briefly so that it doesn't get lost in familiar connotations of our chosen category.

Learning important things is not easy; learning important things requires effort; learning important things is ultimately worth the effort since doing so leads the learner-practitioner to not only acquire knowledge and skills, but also to tap a vein of meaning that can be self-reinforcing over time.

Teachers know all this, of course, and send out search parties of students all the time. If a student can find deep meaning in an assignment or course, everybody wins. The teacher does her job and the student hits the learning target. More important, the student learns how to learn – learns what learning feels like. The student may forget the concept, but if she falls in love with the search for knowledge, then that's the person you want to hire, that's the person you want on your team, that's the future leader of your company.

Teachers don't call the path “delight.” They often refer to it, instead, as the “zone of proximal development,” a term coined by Russian psychologist Lev Vygotsky to describe the space that offers the right kind of challenge, the right kinds of fulfillment, for learners (Vygotsky, 1978). A good teacher pushes students to do things that are just difficult enough. If a task is too difficult, a good teacher knows, students will lose interest and perhaps turn against the assignment or task. But if it's too easy, it deadens learning, too, as too-easy tasks lead students to either develop unhealthy

illusions about their capacities or to, again, lose interest. To stay in the ZPD or just-right zone for learning, students often need what is called scaffolding: something or someone they can lean on when they feel like they cannot take the next necessary step.

Moving forward in your learning, or in a meaningful experience, is not always going to be easy, and it is not always going to provide the dopamine boost that a novel experience provides (that's why it requires a scaffold). A month-long hike is going to have its very low, very slow, very boring moments, but it can still be cumulatively transformative. Writing or reading a book could be the same kind of hard slog – and similarly transformative. The teacher – or leader, seller, service professional, or trainer – shouldn't shy away from dips or what is drab, either. Boredom does not have to be the enemy of delight or meaning.

And, in fact, seeing it clearly helps us to avoid unnecessary avoidance of it.

In an article for *Harvard Ed. Magazine*, Zachary Jason weaves together some leading educational thinkers to talk about the cost of boredom for learners. Boredom admittedly has had a nefarious effect on student learning across the nation. It, admittedly, can lead students to turn away from school, away from teachers, away from things designed to help them.

But Jason doesn't only present boredom in a superficial or typical way. He digs around it. He recognizes, in some ways, its uses. To do anything at a very high level, you have to deal with some of the boring parts; you have to deal with repetitive practice; you have to do things that don't spark interest and excitement. The problem with boredom, then, is often not boredom itself, but the way it is packaged by educators and experts. According to Associate Professor Jal Mehta, whom Jason cites in his article, “We haven't created trajectories where students can see the meaning and purpose that would make the necessary boredom endurable.” Additionally, according to lecturer and author Todd Rose, “We need to get away from thinking that the opposite of ‘bored’ is ‘entertainment.’ [The opposite of bored is] ‘engaged’” (Jason, 2017).

So there we have it. If we make moves only to avoid boredom – in those we teach, train, lead, serve, or to whom we sell – then we may very well be attacking the wrong enemy. Establishing the

right trajectory is critical in that it takes the learning out of the mere moment and puts it into a more inspiring and engaging story. (Ideally, a story of deep meaning.) It also prevents the more entertaining or temporarily stimulating choice that allows a learner (or user) to quickly sidestep a slower or more tedious part of a necessary process – one that might actually be good for them or helpful to them.

Boredom is not the enemy – poor teaching is.

Quiet students in a classroom might be completely off the teacher's task. (They might be watching a video or engaging in a chat with a student in another class.) They are bored and disengaged because they cannot connect the task to a personally fulfilling trajectory.

In his book *This Is Marketing*, Seth Godin encourages his readers to “curate the customers” with whom they work and to “choose the people [they] serve” (1999, p. 32). These considerations are truly important if you consider your customers to be your partners in innovation – the people whose inquiries, standards, and passions encourage you to stretch beyond your current status quo. Returning or regular customers may pay their bills on time and re-up for the new version of your products or service, but they're not always the customers who are going to push you to do work that is truly special or work that will push you beyond your current capacities. Don't trade a meaningful future – that can only be secured if you continue to grow and develop your product, service, people, and/or self – for mere consistency and stability in the present.

Excited students might be responding to a mere trick or joke – or something that happened outside of class. They are giving off the illusion of being engaged, and not bored, but only because they are temporarily entertained.

Disconnected tasks or activities grind learning to a halt, eliminating the potential of classrooms and schools. Likewise, disconnected companies squander opportunities to delight – to add value and to focus on the particular needs of – a particular client or customer or employee base.

Tip

For sellers: Before you cold email or cold call customers, take the time to learn about or understand them. Reshan was recently pitched a lead generation tool, and after the initial outreach from the sales agent representing the tool, Reshan was impressed. The agent demonstrated that he had spent time looking at Reshan's software product and how it was marketed. Though Reshan's company has not purchased this solution yet, it's the first one he would choose because he can tell that they are putting in the effort to construct a narrative around his product and its solution.

For leaders: Serve your team members' time and talents. When they feel like their interests are being served, so that they can in turn serve the company, the time spent together will be that much more effective. Pay attention to the room and be willing to make the hard choice – for example, if you can see clearly that a resolution will not be reached in the meeting time allotted, be the one who steps up and creates a plan to postpone the dialogue.

Remember This Formula: Novelty + Trajectory = Okay

Novelty may capture attention, but without the participant's ability to build deeper meaning around a product or experience, it will not stick. Here's an example of novelty that works – because it connects a student to a continuously meaningful and personally relevant experience, one that allows him to become a better version of himself, doing better things, now that he routinely has this experience.

Zach Sevens – a sophomore in high school when we spoke to him – was doing what most high schoolers in America are doing when they are sophomores: trying to figure out how to be students, how to juggle responsibilities, how to become productive citizens. For Zach, the path toward those aspirations would come through organization. As a busy young man, he knew that he would only be able to juggle competing priorities effectively if he had a solid

organizational structure on which to rely. He tried out a few different systems, but only one moved from novelty to meaning – and stuck. Here are Zach's own words:

I needed a way to organize my work and be able to see what I had finished and still needed to do, but I love using my computer. So I decided to find an electronic checklist system. When I found Wunderlist, I liked the look and the features so I decided to try it. After I finished my first assignment and I went to check it off, the little dink it makes when I clicked it made me want to work more, so I could check more off [my list]. The first time I heard [the sound], I un-checked and rechecked an item a couple times. So I continued using the app. The sound it makes plus the smoothness with which it runs makes me stay with it. I have no reason to switch, and I feel like I am being rewarded every time I complete an assignment. This program helps me get things done because I want to hear that brief sound it makes whenever I complete things. It also makes me want to write out each little thing that I have to do, whether that's different parts of a homework assignment (study + packet) or something I have to do later. I feel like Wunderlist makes me get everything I need to do written down. (Sevrens, personal statement, 2018)

So we're okay with novelty if it is treated as an invitation . . . the beginning of a great story. If it's the crack, as Leonard Cohen might say, “that's how light gets in” (1992). In Zach's case, both the “getting things done” and the “breaking down of complex tasks into manageable pieces” have helped him to develop more agency as a student and human being. At a time in his life when academic and personal challenges are on the rise, he's rising, too, and primed to do his best work.

Tip

For service professionals: Reshan encourages his customer support colleagues to include a screenshot or short video in every support ticket to help increase the chance of being understood. The initial novelty of receiving a media artifact as part of an otherwise text-laden conversation may increase the chance that the recipient will pay attention to the information. Over time, and more important, it will help to shorten the path to understanding between company and client.

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The Unit of Delight

Successful sellers of modern products do right by customers not by selling features, but by selling solutions – not what the product itself can do, but the outcome that is produced through its use.

As such, the designers of those products and experiences focus on that which allows users to accomplish a goal – quite simply, usability. The users may press buttons or select options or hear pleasing sounds along the way, but the total outcome for her or him matters most. And the total outcome is the result of – and in direct association with – those described actions. As Zach from [Chapter 17](#) knows, it's nice to hear a crisp sound when you complete a task; it's transformative, though, to experience the total outcome of planning and executing a complex array of tasks and projects, that is, the total outcome of being a fully independent agent. Therese Fessenden parses delight into two categories: that which is “local and contextual...and derived from largely isolated features” and that which is “holistic, and is achieved once all user needs are met.” Features in isolation may offer novelty, but they are not all encompassing. They do not change the user's relationship with his or her work. They do not change the user (Fessenden, 2017).

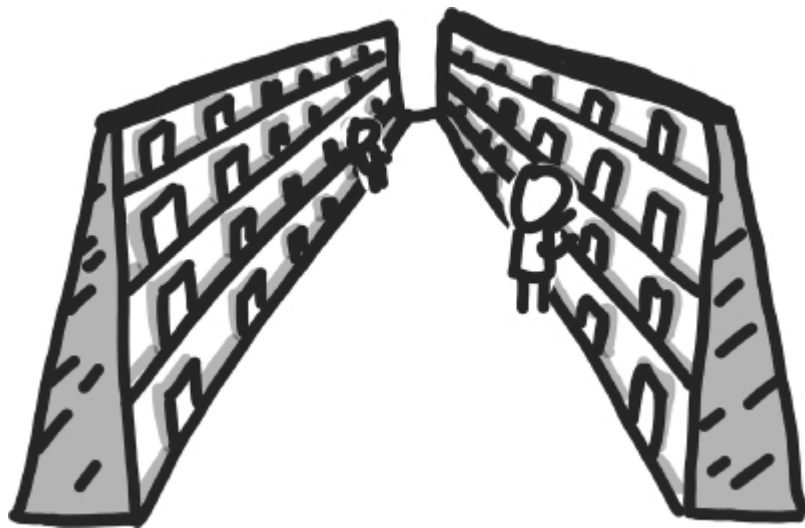
Sellers, leaders, trainers, and service professionals, therefore, should not just be focused on the solution (the outcome); they should be focused on how the process toward that outcome is experienced. The process – or experience – is “delightful” when the user (or customer or trainee) returns consciously or subconsciously to the process. They know the thing that pleased them and are there to seek it again. Or they don't know exactly what it was, but they remember how they felt and are happy to return to the entire experience. To put it simply, then: build toward the total experience. To put it even more simply: build the total experience.

Add Dimensions of Delight

Netflix may seem like low-hanging fruit as an example, but its path toward a total experience is both instructive and easy to see (making it authentic and immediate, as well.) They solved a problem, mastering movement along the x -axis; then they started to run up and down the y -axis, adding dimensions of delight for their customers.

The story begins in the 1980s and 1990s with Hollywood movie rentals. Back then, VHS tapes were organized in a specialized store (like Blockbuster Video or West Coast Video), and as a member of the store, you could rent a movie (or two or three, depending on your membership level) for two days (or more, also depending on your membership level). You were encouraged to “be kind, and rewind” before returning the video to the store so that future viewers would not have to rewind it.

As DVDs became more ubiquitous, they replaced VHS tapes. Video games also started to become a rental option. “Be kind, rewind” became a thing of the past – a problem solved across the board for an industry by an advance in technology.



Movie rental stores were a service – a storefront where movies could be rented. They solved a range of problems for people. Consumers wanted to watch movies produced for the big screen – new releases and classics – in their homes for several known reasons: they couldn't watch them anymore in the theater, they were more comfortable watching something for the first time in their own home, and/or they did not want to commit to purchasing the movie at four to five times the cost of a rental.

Enter the video store. Going to the video store involved:

- Travel – Going to the store.
- Search – Finding the thing you were looking for or the possibility of stumbling upon something you might be interested in if you happened to walk down the right aisle, which was arranged at the discretion of the store.
- Stock – A bet that the movie you wanted to see was available at that location.
- Physical quality – The hope that the item you rented was not damaged by a previous renter.
- Accountability – The commitment to return the rental on time or pay a late fee.

None of these are dramatically painful experiences. They are inconvenient, sure, but not life-threatening. (Remember, this isn't meant to be a lofty or even noble example – just one we can easily see.)

When Netflix's DVD-by-mail product became the leader of those trying to provide a DVD-by-mail service, it solved:

- Travel – You did not need to leave your home.
- Search – You could search for the thing you wanted online and be provided with similar suggestions.
- Stock – Netflix built several fulfillment centers in order to increase their total available stock and you could find out online if something was completely unavailable at the time with an expected availability date and an ability to reserve it in a queue.

You could handle the entire transaction on the Internet, and the DVD would show up in your mailbox.

The other inconveniences, physical quality and accountability, were still present, but Netflix kept innovating and kept adding value. When Netflix introduced streaming video services it solved the issues of:

- Travel

- Search
- Stock
- Physical quality – With online streaming, there was no longer a concern about the physical quality of the media.
- Accountability – With no physical medium to return, it was impossible to be late. The entire online catalogue, quite limited initially, was available for a subscription fee.

By this time, Netflix had effectively learned to dominate the x -axis of video rentals. They improved on the process until it was unbeatably functional and smooth and until they were doing what Hollywood Videos and Blockbuster did – only more conveniently – for users.

Then Netflix started to climb up and down the y -axis, adding value or delight by offering (1) recommendations to individuals based on their viewing habits (using big data in new ways), and (2) integration via their software into televisions. Eventually, they started making their own content based on what viewers liked, clicked on, and actually watched (Petraetis, 2017). This last move releases them almost entirely from the x -axis, as they are no longer reliant entirely on outside vendors to provide them with their shippable product.

Entertainment is still not the opposite of boredom, but this doesn't mean that the business of entertainment cannot, in itself, be delightful. For those who take seriously the enjoyment of filmed stories, for those who, perhaps, build their family's Friday evenings around popcorn and a movie, Netflix has arrived like a tightrope walker on a bicycle, extending the experience beyond everyday miracles.

Offer the Private Plane, Not the Bus

Part of Netflix's success stemmed from the fact that they were able to change the habits of an entire generation of customers by adding noticeable value, and not mere novelty, on top of all the alternative ways that value could have been presented. So many customers of video stores started using Netflix (or other options resembling the Netflix model) that video stores disappeared. A report from *Business Insider* in July of 2018 rounded up the few

remaining Blockbuster stores before they closed (Taylor, 2018). Last we heard, one store remains open in Bend, Oregon, kept afloat by nostalgia, kitsch, and the occasional quirky partnership like the one they formed with a beer company. See, or sip, The Last Blockbuster Beer: a light-bodied black ale that is said to pair well with buttery popcorn (Zanger, 2018). (It can be argued that this store has simply found new ways to be delightful, and the canny reader might develop a blog post or article around that topic.)

The founders of Netflix changed customers' minds, but they apparently could not change the mind of Blockbuster itself when they approached the CEO about a partnership and were supposedly laughed out of the room (Sandoval, 2010). Purveyors of delight will often be in that same position – wherein they have to convince people that the value they have added, or will add, is worth an investment of time, treasure, or attention. This frequently involves overcoming resistance to change, which is something, ironically, that the founders of Netflix could not do when they approached certain decision makers at Blockbuster.

We spoke to Jaime Casap, Google Education Evangelist, who at the time of this writing, had the lucky job of spreading the word about a product that is delightful in most ways. Interestingly, though, he approached change by turning it on its head and by thinking about the way it plays out in the minds of his clients (or, if he's consulting, his clients' clients). “I don't actually believe in resistance to change,” he said at the start of our conversation. “We, as human beings, do change. We change every day, we always change, we adapt – that is what we do. We are humans. And so, I don't believe in resistance to change. I believe in resistance to pain.” (Personal statement, 2018)

He then shared an analogy with us that connects in deep ways to the ambition to create delightful products and experiences and also to lead others toward them in a manner that will help them commit to them.

Mr. Casap has flown a lot. In fact, he has been traveling constantly for 25 years. And, like any good road warrior, he has a routine, a pattern, has his “day bag, [his] three-day bag, [his] seven-day bag,” and knows how to pack each of them quickly. It takes him about 30 minutes to move through his home airport to his seat on whatever plane is carrying him to his destination. If air travel were

video rentals in the 1980s, he could be said to have his Blockbuster game under control.

Given that metaphor, you know where this analogy goes next. He uses his comfortable base as a pivot point for his thoughts on change:

If Google said to me, “Look, you are traveling a lot, so we're going to get you a private plane that just waits for you at the airport, and whenever you need to go anywhere, you can just pick up the phone an hour before you fly and call it and it will take you wherever you want to go.” How resistant to that change do you think I would be?” Not very.

Then he posed the opposite question based on the opposite scenario: “Now, if they said to me, ‘Hey, you are traveling a lot, so from now on we need you to travel only on buses,’ then all of a sudden I would see the change.”

Seeing the change would cause rhetorical Casap, or anyone, to become resistant. Starting from his status quo – of a travel experience that did what he needed it to do – he would start to list all the ways in which the change would slow him down, cause him inconvenience, take him away from his family for additional time, and reduce his effectiveness at work. And then, these reasons would be the barrier to the change. Pain, whether real or imagined, would be in the middle of the decision like the Sphinx at the gate of an ancient Greek city state.

Oftentimes, when we are trying to help someone understand a concept or acquire new skills, we present the bus and not the private plane, and people resist, of course. Why would they want to go backwards?

Why Change?

According to Casap, when considering a transaction or thought, we often pile on the negatives as a way of confirming our existing status quo – even when we are facing an objectively good option. Having found his dream home recently, he almost didn't buy it. Why? Because, when he walked out of it for the first time, after confirming with his wife that it was, in fact, the perfect home for his family, he started making “bus lists”: “we're going to have to pack everything...the office isn't really ready...moving is going to take a lot of effort...do we really need this kind of disruption in our life right now?”

What did they not talk about right away? They didn't talk about the private plane parked right in front of them.

When dealing with clients, Casap calls upon his insights – about how people work and also how his own life unfolds from day-to-day. “It's a natural tendency to focus on the bus and not the private plane,” he concludes. “When I talk to people who are doing change management, I say, ‘What's the private plane that you're presenting? If you don't have a private plane, why the hell are you changing? Why would anybody want to change?’”

Too often, even when we're selling something delightful, we hand people problems instead of solutions. Only thinking about the thing we're trying to sell leaves out one important consideration: our focus on the process toward the outcome that the product or service makes possible. Or, said another way: the value created through use and extension.

Tip

For service professionals: When servicing a client or providing support to a customer, think about how the problem you are addressing or solving can be delivered with delight. Chances are, the issue is not routine or something predictable (otherwise why do they need your help?). Having trouble? Consider this: the actual thing you fix matters, but how the customers felt during the service will influence their wanting to work again with you (and your company) in the future. Solve problems, sure. Just be sure to add value, as well.

Creep alongside Your Mission

Jack White of White Stripes fame is an extraordinary guitar player. He has played with the kind of big, brash, confident style that harkens back to the great Blues musicians while showing others what the future might sound like. What's more, his lovingly rendered Third Man Records (studio) has allowed him to entertain pursuits that seem to be more distantly related to his virtuosic, god-like, guitar shredding (Eels, 2012). There, he has produced music for everyone from the Insane Clown Posse to a band comprised of people working for the Nashville Metropolitan Transit Authority. He has also used the company to send a vinyl record and record player into space – and it actually played.



Looking objectively at the output of Third Man studio, it's possible to wonder if White has lost his mojo or if he has created a distracting circus around himself; if, in business-speak, a lack of

discipline paired with rock star money and ego have opened his operation to mission creep.

Listening to White's comments about these pursuits makes us wonder if he has not been up to something else, though.

"I'm trying to get somewhere," he told the *New York Times*. And in the same interview, he admitted that Third Man Records is, indeed, a "McGuffin," but a highly functional one at that: "It's just a tool to propel us into the next zone."

White continues to make music, sure, but he has located its value, and his value as a musician, outside of music itself – outside the product.

Which is ironic, because he has pulled off this feat, at certain times, by elevating the artistry around the musical product itself. At a time when music is increasingly ephemeral, because increasingly digitized, he's investing in technology that allows him to literally press and distribute actual vinyl records. He's recording musicians that he thinks are vibrant and resonant, even if unknown. He's experimenting in ways that draw attention to musical archives and oddities.

We'll never know why, exactly. But perhaps, in these endeavors, he's learning more about his audience, or he's hearing something in a collaboration that pushes his own music in a different direction. Certainly, if he keeps pushing far enough and wide enough, music and the ways in which humans receive it may never be the same. Going beyond his mission, it seems, could be just what music, or at least Jack White's music, needed.

If you squint your eyes, you'll see a business equivalent starting to take shape.

Here's Chuck Robbins, CEO of Cisco, speaking at a conference in 2018: "It's incumbent upon businesses to make sure we are taking an active role in creating opportunity for everyone...Increasingly, businesses are going to have to get involved in things where you can't draw a straight line to the business" (Robbins, 2018).

And here's Venture Capitalist Fred Wilson, urging companies to understand the true origins of their investment dollars:

“Bad actors” doesn't simply mean money from rulers...who turn out to be cold-blooded killers. It also means money from regions where dictators rule viciously and restrict freedom [or] money from business interests which profit by poisoning us with opioid addiction or warm our planet with fossil fuels. (Wilson, 2018)

He then pushes his entire sector to think more deeply, with more honesty and integrity:

It is time for all of us in the startup and VC sector to do a deep dive...and ask the question that [a CEO recently] asked me. Who are our investors and can we be proud of them? And do we want to work for them? (Wilson, 2018)

There's the value in the thing itself. But, increasingly, there has to be value around the product, the service, the software, the provider.

A recent study by FleishmanHillard, a public relations and digital marketing agency, confirmed this. They describe the existing environment in which many of us do business as “zero gravity” (2018). In zero gravity, business leaders face an “issues-laden environment that quickly tests corporate values...where every issue in the spotlight feels like a competing force.” The main question in an environment like this is, “when, and how, should you speak up” about key issues?

According to their study, more than 65% of the consumers they surveyed have often or sometimes stopped using products or services because a company's response to an issue does not support their personal views. And nearly half of consumers are not at all likely to purchase from companies who they think promise one thing but act in another way (FleishmanHillard, 2018).

But don't read those statistics the wrong way. The primary danger in holding a position or value with which your consumer does not agree is staying silent about your rationale. You won't lose all the consumers that disagree with your position or deep values.

What does any of this have to do with delight? Plenty (though perhaps we, too, are pushing past our mission at this point).

Delight, as we have noted, is not always easy. It sometimes involves trudging along a trajectory that, ultimately, adds significance, relevance, or meaning to a task, product, training, or

exercise. It exists, and should be sought, because it speaks to a consumer desire – to locate elements outside of products and services themselves that complete the experience of using these products or services. You are not simply offering goods or services; you are not simply solving problems; you are also helping consumers feel good about the company behind the product or service, behind the solution. (Authenticity is always ethical: going all the way back to Aristotle's assertions, humans taking care of humans, humans teaching humans, by definition, cannot wish for something bad for one another.)

Again according to the FleishmanHillard report: “[Often] the biggest action you can take is to reveal the company's authentic reflection on [an] issue, [actively] listening and seeking potential areas of change” (FleishmanHillard, 2018).

These moves, though deeply serious, are close to what, earlier, we defined as transformative play, or in the words of Tekinbas and Zimmerman “a moment of transcendence, in which those structures we took for granted suddenly find themselves cast as players.” (Reading that, you might think of White's space-launched record player, which both plays the music and becomes, in this case, a critical part of the way in which it is received.) They continue: “Grammar tells a joke. The ballroom floor gets up to dance. The rigid Rule becomes supple and limber and jumps into the arms of Play.” (You might think next of Cisco's CEO and his thoughts on where business needs to go.) They end:

“Transformative play can metamorphosize the players of the game, the culture of which the game is a part, even the game itself (Tekinbas & Zimmerman, 2003, 605). (You might think: Delightful products and services should aspire to nothing less.)

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After Delight

As we approach the end of this section on delight, let's jump back into the classroom for a moment. Let's imagine that we're joining a class that has been deeply engrossing, filled with inquiry and joy, a smorgasbord of intrinsically motivated participation punctuated by laughter and those aha moments that make learning so personally rewarding. (You might try to envision the last time you were in a classroom like that and place us there.) In short, we're nearing the end of that really good class, we've experienced sustained delight...and now what?

Work toward Good Homework

The best teachers know that the learning effects of a class, even if that class felt like a success for both its students and its teacher, will begin to fade as soon as the class is dismissed. That's why great teachers end, and extend, their lessons well.

Near the end of our hypothetical great class, our hypothetical great teacher would intentionally shift to synthesis, rehearsal, and extension. She might ask students to make personal meaning out of what they learned. She might ask them to apply it to their hoped-for career. She might ask them to fill out a quick survey to both ingrain what they had just learned and share back assessment data, which she could then use to identify gaps in learning and plan future classes. She might hand students an index card, ask them to use it to answer a question, and have them hand in the card before they left the classroom. This last move is called providing a “ticket to leave,” and the best teachers use varieties of it all day long – to sharpen focus and effort right before their classes are dismissed.

There might be one more move, of course, before students physically leave the classroom, and that's the announcing of homework. Increasingly, this task is handled digitally, since many teachers post homework online, but just as many teachers offer a quick oral reminder to students as they are heading out the door.

It can't hurt, though homework itself often can and frequently does.

As such, homework is something that many adults remember with a mix of dread and resentment. After going to school all day, maybe playing a sport or performing on a stage, many students in America head home with a pile of homework. Some of it is effective; some of it simply robs them of sleep, and therefore has invidious long-term effects on their learning.

School is rarely perfect, but the best teachers know that effective homework flows from a few simple principles.

Homework “must have a purpose” and students should know what it is (Checkley, 2003). Second, homework, to be effective, can be used to make sure that students understood something. This goes back to the black box concept we discussed in the Authenticity section. Homework, planned well, helps teachers to know what's happening inside the black boxes of their students' understanding. Last, for our purposes, homework can be used for practice.

To sharpen that last point about practice: homework that asks students to practice should be “assigned for ‘perfect’ practice” (Robbins, Gregory, & Herndon, 2000). As we know from the math and science teachers we met earlier in this book, “errors practiced are difficult to undo” (Robbins et al., 2000). If you can afford it, never allow anyone to practice something the wrong way.

Also, if you want to raise someone's understanding, you have to find ways to spread the learning over time. You can handle some of that seeding during class and some of it with an effective homework instrument; then, you can return to the understandings that matter in later assignments, later homework. Layer after layer after layer.

Or like baking bread, baking anything, you have to expose the ingredients to heat over a period of time.



For the scholars, here's the same point, said in a different way, at a different point in time:

Cognitive psychologists have pointed out that learning evolves through a coordination of ideas and experiences that requires focus and effort over time. (Fischer & Bidell, 2006; Grannot & Parziale, 2002; NRC, 1999; Siegler, 1998; all as quoted in Schwartz, Sadler, Sonnert, & Hai, 2009)

And again:

The models of cognitive development that these authors have developed and use in educational contexts stress the importance of building and rebuilding ideas in multiple contexts to achieve general principles that can be applied to new problems. (Schwartz et al., 2009)

Layers upon layers often equal deep learning. Providing a synthesis activity in the final stages of a class followed by a homework assignment that helps students to understand its purpose for their learning, demonstrate their understanding of their learning, and practice perfectly whatever most needs practice – this is how a great teacher will extend the delight of a great learning experience in a classroom.

Tip

For trainers: Following a training, give the participants meaningful “homework” that goes beyond recall of facts or answering some questions on a form. Find a way to make the follow-up activity feel useful by making its completion a necessary part of the next training or the next step in compliance. For example, if training a sales team about how to sell a new product or service, don't just ask them to complete a quiz that shows that they know about the product or service. Have them practice – and record – themselves selling (could be a simulation) that product or service and assess them on that. Ask other students to give feedback on their peers' sales pitches so that they can get better at identifying strengths and weaknesses that they may apply in their own work.

Plan for Retrieval and Personal Relevance: Part 1

While researching this chapter, we both had parallel experiences wherein what could be called “synthesis” and “homework” were used masterfully in the wild by companies with which we had just had delightful experiences with our families. It's quite possible that we found these examples solely because we were looking for them – the opposite of homework, this move is sometimes called priming – but we found them nonetheless.

Steve's experience was with a basketball camp that his son attended for part of a summer. Each Friday, right before pick-up, Steve would receive an email from the camp that would suggest questions “for the ride home.” Steve's favorites were questions about habits and forward thinking because, to him, these felt like great homework, the kind that “arrests forgetting, strengthens retrieval routes, and is essential for hanging onto the knowledge you want to gain” (Brown, Roediger, & McDaniel, 2014). In these follow-up conversations, Steve's son often talked about a key principle that he had learned, walking back through the way it was taught to him or why he thought it was interesting. Prompted, he also teased out personal relevance, thinking out loud in particular about how skills or mindsets could be useful to his upcoming season.

Equally, the questions helped Steve to learn, affirm, and rehearse the camp's lessons in a way that was personally meaningful. What parent wouldn't relish the chance to think about not only his son's development as an athlete, but also his development as a human being.

By co-opting a car ride that could have been a space for mere zoning out or listening to music or talk radio, the camp added value beyond where it needed to, helping Steve and his son to return consciously to a process (of practice). We knew the thing that pleased us, and these questions reminded us and helped us to seek it again.

Plan for Retrieval and Personal Relevance: Part 2

Meanwhile, Reshan, also with a brain primed for delight, traveled with his wife and daughter to the Rockefeller Center American Girl location (New York City) to celebrate his daughter's seventh birthday.

In the cafe, a critical part of the experience, his server pointed out the new eating placemats for the dolls seated at their table. She then mentioned that, on the back of the placemats, Reshan and his family would find “conversation starters” intended – like the basketball camp example above – to give adults and children something to talk about while waiting to place their orders or waiting for the food to arrive. (Again, this was time and space that could have been used in a suboptimal way by the participants. Coopting it helped American Girl to serve its customers by keeping those customers locked into focus on the experience. In a good spell or story or bread-baking session or classroom, every minute counts.)

Before departing, the server also mentioned that, previously, these questions were on a centerpiece on the table. But enough people asked about taking them home that the decision was made to include them as “take home” toy items.

Reshan's family had a wonderful time. They used the questions sporadically throughout the meal, keeping themselves focused on the particular play into which they had walked. What intrigued Reshan, though, was the way the play continued...well beyond their meal and their ride home.

After a few weeks, when Reshan realized that his daughter was still using the conversation starters in her own imaginary play at home, he knew that something special had happened...and been delightfully extended. His daughter had been transformed by an experience. She was playing in a brand-new way. She continued to return to the scene of the original experience.

In the teaching parlance, it's not difficult to explain why she would make this imaginary trek again and again, and how such continual trekking becomes a self-fulfilling prophecy: “While the brain is not

a muscle that gets stronger with exercise, the neural pathways that make up a body of learning do get stronger, when the memory is retrieved and the learning is practiced” (Brown et al., 2014). That kind of retrieval and practice is what you want for your brand, for your experience, especially when you believe that your mission is what is truly best for your customer. That's what you want, and you can attain it, but not by accident.

In an interview with Kamille Adamany, director of Restaurants & Retail Experiences for American Girl, we learned that the table talkers were created – very intentionally – prior to the opening of the first Cafe at American Girl Place Chicago in 1998. They were “part of founder Pleasant Rowland's vision for creating a memorable experience for girls and their families as they spent a special meal together in the Cafe.” They were baked into the original design of the Cafe; they were seen as an extension of mission and meaning, as part of what was hopefully going to be memorable about a family's experience with the brand.

Like a good homework assignment, the placemats had a clear purpose. They were designed to be “doll sized,” “enjoyed again after the dining experience is over,” and to offer “lots of opportunities for at-home play.” Rehearsal, rehearsal, rehearsal: that's what both a good teacher and a savvy business person would seek in this case. The goal is the same – to run people down the neural pathways that you want them use when recalling what you want them to recall.

What we call delightful practice, American Girl calls “experiential retail,” and they have aimed to lead that market from their inception. Making meaning in the store was job one:

The idea of a large-format retail store with a full service restaurant and a live theater was unheard of at the time, but bringing to life these girl-centric, brand-specific experiences within the retail store was the manifestation of, in the words of Pleasant Rowland, “all we make, all we teach, and all we believe.” Table talkers are but one of the many touch points throughout our stores we've created to help girls make meaningful connections with their families and friends as they engage with our brand. (Adamany, personal statement, 2018)

The table talkers, in their original conception, helped to extend the intentions of the company and its founder. Later, that meaning, that could only be made in person rather than online, was deepened when the table talkers were sent home with families. This decision emerged from an understanding of families' needs and desires.

We know that life is busy for families. We're all about helping girls and their families connect and spend quality time together, whether it's at one of our stores or at home, and the table talker experience is just one way we're doing this.

A great teacher knows a homework assignment truly worked when her students enter the classroom talking about it. In that way, it provides a runway to the next learning experience. The table talkers function in much the same way, building momentum around families' annual pilgrimage – that is, return – to a physical store. As Adamany concludes:

We have a lot of people who return to the Café every year, especially around the holidays. Those guests remember the table talkers and look forward to playing [with them]. I had one mom tell me it was her favorite part of their annual trip because she liked hearing how her daughter's answers changed over the years. (Personal statement, 2018)

That's pure delight: adding value where, previously, there was little or none, pushing past mere novelty and toward something more meaningful and lasting.

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An Invitation

Call me Ishmael ...

If you really want to hear about it, the first thing you'll probably want to know is ...

Those are the opening lines of some of the most beloved and best-selling books of all time. That they employ a kind of direct address to the reader, from the outset, is at least part of what allows these books to cast a spell on readers from generation to generation.

It's a simple move, really, born of intense conviction. The authors say, "I see you; you see me; come along on my adventure."

Just remember, though: an adventure requires commitment from both the leader and the follower. If you are the producer or leader, then you have to make the right invitation. You have to leave room for the consumer or follower to step forward, to make his or her own personal relevance. If you do not, then you are no better than the teacher who lectures and leaves no time for the class to synthesize; you are no better than the teacher who gives a test but never offers feedback. (Perhaps you have had a teacher like that. Think about that classroom and your level of engagement. Think about what you learned.)

On the flip side, if you are the consumer, offered the invitation, you have to move forward in order to complete the adventure. You have to be willing to be changed, or else you are just another disengaged student who failed to meet a teacher halfway.

When delight works, it works fully, on the parts of us that are not always obvious or projected outward.

Earlier, we met Robert Steed. We like his definition of success – so much so that we're going to repeat it:

Whether something "works" is based on whether the minds of participants in a program are opened to new ways of thinking, whether they can experience their reality in a new way, whether they can incorporate both head and heart, both mind and feelings, in resolving issues. (Steed, 2005)

In short, to do certain things, to participate in certain events, trainings, and so on, you must change your life. You have to grow in some way to get there. You have to acquire a new skill, a new way of seeing the world. It's not the feature. It's not the gimmick. It's not the hack or the trick. It's what *you are* while you're doing it, what *you are* after you're doing it. It's what you want to continue *to be* or what you want to *go back to*. Then, it's how you *go forward*.

We've argued in this book that your work – whether sales, training, leadership, or service – can feel like the work that happens in the best classrooms. We've tried to articulate what those exchanges can look and feel like.

Do you think enough of your customers or clients to play to the very best versions of them? To work to know where they are, so as to project where they might go, and to help them move quickly? To not simply play to their baser instincts, but to help them aspire to their highest potential? (Again, we're coming from the point of view of teachers, so perhaps it's easier for us to believe that such asks are possible.)

What's more, are you asking whether your product or service or training is calling people to the right kind of change, the right kind of transformation, so that they can do the things that they were meant to do?

Think back to that statue, the archaic torso of Apollo. The statue is a perfect product, one immortalized by an immortal poet, only because part of it is missing. In that, it's an invitation onto the *y*-axis, away from the status quo, onto the private plane. If the viewer is willing to study the rest of the statue carefully enough, give enough of himself or herself – by way of time, concentration, imagination – then he or she can complete it, can see it, can own it forever...inside, where it counts. The viewer must change in order to complete it. That's why the statue is so valuable. Like any good teacher, its value is assessed by the ways in which those that came into contact with it have been amplified, changed, improved, given greater possibility for life, transformed.

Do you trust your audience, your clients, your team, your customers enough...do you know them enough...and is lifting their understanding a deep concern of your product, your service, your

engagement with them? Are you trying not just to charge them but to change them?

Now, having reached this point in our book, we certainly hope so.

MAKE YOURSELF CLEAR WITH DELIGHT

Good teachers always consider the larger narrative of which a particular unit or lesson is a part. One way they do this is through backward design, wherein they begin their planning at the end of a curricular section and clearly elucidate the deep, significant questions that students should be able to answer when they reach that end. Then, they plan forward – all the activities, all the readings, all the assessments, all the discussion – with that end in mind.

What a seller-as-teacher can do ...

Selling is often a matter of cutting through the noise. But how do you ensure that you're not just repeating what could be found elsewhere? How do you ensure that your offering is going to add value? Many products are able to self-serve these days because a customer can experience them, recognize their value, and then make a transaction decision. But self-service doesn't work for all products or services, and a human needs to help a customer understand or recognize that, “wow, this product or service is not only solving a problem, but also, it's adding new value.” Complexity, sophistication, or nuance can certainly be part of a value proposition, but if you intend to include them (or sell them), prepare to deploy (or be) a skilled human to help lead customers to understanding and appreciation of the finer details.

What a trainer-as-teacher can do ...

In training, much like teaching, everyone is going to be aware of all the choices that the trainer or learning leader has for instructional delivery, for assessment, and for content. That audience will want to experience training in a way that doesn't only “get the job done” or convert them, as novices let's say, to a certified status. Instead, whether they know it or not, they will want to be encouraged to return to the subject matter in an intrinsically motivated way. Good training should instill in the trainee a desire for more training, for more knowledge. It should breed curiosity in the learner.

What a service professional—as-teacher can do ...

Service is a lot like *delight*, especially because somebody who's attending to services – either planned or in response to an urgent problem – has to consider the emotional state of the served. From a service standpoint, nobody likes to part with cash on an ongoing basis, regardless of what service is being performed or what was negotiated. They want to know that the service is being completed and done so in the best possible way. In a support transaction, whether via phone, chat, or email, it's the same. How do you avoid merely serving up the status quo, and instead, make sure something is happening that adds to the customer's delight? We're not simply talking about clever messages – though they are nice – or simple hits of novelty. We're talking about those things that make the customer think, “Hey, my time is really being considered here.” Something as simple as a call-back feature on a support line can be a beacon of delight for customers.

What a leader-as-teacher can do ...

Leaders have to consider the habits, routines, and processes of those they are leading and should be particularly cognizant of those habits, routines, and processes that they have the authority to influence and demand that others follow. The led will always be aware that a leader has choices, and they will especially appreciate leaders who consider them and think of all the ways that a work experience could have happened and whether or not it is happening in a way that adds value, spreads joy and satisfaction, and offers long-term fulfillment.

CONCLUSION: CLOSING THE CLASS

And so we've come to the end of a long and winding class, and we now invite you to think back – and map – how you found your way here, to this conclusion.

Did you scan the images in a deliberate way? Did you read only those callouts that related to your particular area of interest? Or did you read every word, stopping to puzzle over those aspects of the text that were unclear to you?

Next layer of questions: Why did you choose to scan or skim or read the way you did? What motivated you on your path through the book? Were you trying to learn as much as possible as quickly as possible? Were you stubbornly committed to reading every word, regardless of your level of interest or the return on your attentional investment? Were you reading the book haphazardly only to be able to mention something at a training or in a meeting or when you next grab a coffee with the person who gave it to you?

Final questions: How did you learn to learn the way you do? Was it intentional or just something that you fell into and then formed a habit around? How did you learn what was good enough for you? For others? For your job?

Think Like a Teacher

We are asking these questions not because we're judging you, and not because we have a specific “best” answer in mind. We are asking in order to make you aware of your own learning preference, to make you aware that such a thing exists and can be unpacked.

Because, if you have a learning preference, if you have a preferred manner of moving through material designed to teach you something and inspire you to act, and if you expect your preferred mode to be respected and trusted, then it's only fair to recognize that other people, all other people, have their own learning preferences, as well, and that these preferences sometimes shift due to circumstance.

If you can hold onto that point, then you can exist at the intersection of business and teaching. It's a good place to be. From that perch, you will improve your chances of being understood, and you will alter the direction of your work and possibly your business by better understanding the people you serve. Helping others learn, too, you will become a trusted advisor. As they improve, you will improve. And as you both improve, your industry will become more vital, more necessary. These are broad aspirations, of course, but they are neither unreasonable nor unseemly. Society has always needed teachers. There's no reason that they should only exist and flourish in the classroom.

There's more room for more flourishing. By listening carefully, by slowing down to make room for others' reflection and learning, by observing carefully, by offering feedback, by providing insight or information or praise – or pause – at the right time, and by really paying attention, you can make progress by instilling understanding and making meaning in the admittedly complicated, complex, difficult environment in which we all seek to do business.

All humans, not just young humans, deserve to be seen as learners, as full of the possibility that such a name implies. It takes only a teacher's eye to see them, a teacher's voice to name them.

Make Yourself Clear

The irony of ironies is that, often, people (including us) who are most urgently trying to communicate, most urgently trying to build understanding in others, work against our own message because we stand in our own way. Either our ego or our default mode of communicating is actually preventing us from communicating.

We do not tell enough stories; or we tell too many without providing appropriate data.

We raise our voices when we seek to convince, creating defensiveness in others, instead of listening to understand.

We write in lists without ever providing vivid images to connect ideas.

We offer text when a picture would be more memorable, or ask people to discuss a picture when they would be better off quietly

reading something so as to arrive at the same starting point before a meeting begins.

Making yourself clear, as a teacher, is about all the things you can do to communicate, but it is also a constant reminder not to get in your own way. We tell people this all the time. Sometimes the best way to help people grow or help people learn is to remove yourself as much as possible from the equation so that they have to confront directly what you are selling, what you are saying, and then have an experience. Off to the side, you can then be there as counsel or as coach or as extra set of eyes or as extra set of hands.

Put it this way (or these ways):

If you sell people something that they did not really want, then sure, maybe you made a commission, but you will not have lifetime clients. Make yourself clear. Help them see the product or solution that they really need.

If you train people in a way that gets them to a certificate but that does not help them to really own the knowledge or skills, then they will never take full responsibility for that training or knowledge. They will never absorb it in a way that allows them to use it – to serve others – in a seamless and fluent way. Make yourself clear. Help them to connect directly to the knowledge or skills so that they become second nature for them.

If you service the problems of others and they remain dependent on you, they may call you back annually or as needed, but you'll be utterly replaceable at some point, able to be swapped out for the first service provider who undercuts your price. Make yourself clear. Help your clients to see rudimentary solutions without you so that they call you when they need your unique perspective, your creativity, your temperament.

If you lead others in such a way that they rush back to you whenever they meet a new challenge or they crumble whenever someone or something challenges them, they will always be followers. Make yourself clear. Empower those you lead to lead others, even if that means they need to leave your team or company.

A Simple Heuristic

To help you in this text, we have appealed to various kinds of minds – by telling stories, summarizing and presenting research, using metaphors, providing illustrations, checking for understanding where possible, and providing you with space and time suggestions to offer you room to reflect on your own learning.

We have offered you concrete teaching moves, mindset training, and enthusiastic support.

But we have also organized our main concepts into a simple heuristic. One that can help you to discover, again and again, the best path to clear communication. If you remember nothing else, remember this:

Where possible, approach people in ways that are authentic, immediate, and delightful.

Here are the definitions of those words, as we have used them and shaped them, slightly altered for the current context:

Authenticity is bringing what is most human about you to your work and relationships, and taking care of that which is most human in others.

Immediacy is offering that authentic care at the highest point of your own contribution – at the right time – and the highest point of impact or need for the other.

Delight is helping someone onto a track or position that won't reduce them down to a machine or a mere amygdala looking for the next provocation.

Even if you pursue one concept only, doing so with enough persistence and drive will lead you directly to the others.

To take care of others during a transaction, you will often have to offer them immediate resources or support. And immediacy, well construed, requires a knowledge of, and respect for, the people with whom you are involved. Delight requires authenticity; you have to care enough about the people in your network to help them to pursue deep meaning, to access deep

wells of motivation, and to achieve things that cannot always be measured with reductive instruments or rewards.

Teach

Let's end with a little thought experiment.

You are asleep and you're dreaming. In the dream, it is 7:55 a.m. and you are fast-walking across a crowded building filled with people. You are trying not to spill your coffee. You are hoping that you have remembered to bring your notes to help you remember the finer points of what you need to deliver.

When you finally get to the room where you're going, you realize that 18 15-year-olds are waiting for you, and they are in various states of unpreparedness. Several of them look like they just woke up and are definitely going to go back to sleep within the next five minutes. Several of them simply scowl. They have not spoken to you in weeks. A few of them are laughing and giggling. A few are on their phones. As you turn to face the board and write something down, hoping to gain some control, a paper airplane crashes into it. The class erupts in laughter. You turn to face them. You wake up.

In that moment of waking, most of you, not being teachers by profession, would feel greatly relieved. You would look around your room and smile. It was just a dream. A bad dream. "Thank goodness that did not really happen," you might say to your husband or wife or just out loud. "Thank goodness I do not have to stare down a group of students today."

But, if we were to take your next 18 clients, customers, or colleagues and put all of them in a room, you would be facing a very similar circumstance. The 18 people could be a mix of people who were bored or agitated, or not paying attention, or doing something else. The 18 people that you were trying to lead on a team could be joking around or making their own version of a paper airplane or half paying attention. The 18 people could be ornery, could be mad, could feel like they already knew what you were going to say next. The 18 people could wonder why the heck they have to be there and what they have to gain and when you are going to check the homework that they forgot to do.

We're sorry to break it to you, but you may not be that different from the teacher in your dream. The only real question is, what are you going to do about it?

Are you going to embrace your role as a teacher and realize that, when students in a classroom are ornery or angry or joking, sometimes they simply do not feel engaged or they simply misunderstand the assignment and are deflecting? Are you going to own the fact that they may not see the point or the relevancy of what you are offering? Are you going to take responsibility for the fact that you may not be telling a compelling enough story?

We are here to help. Simply. This book is here to help. Again and again – that is why we designed so many pathways through it.

And here is the last evidence of our intentions, the last secret we will share. At the end of the day, classes are terrible or extraordinary for one simple reason: a teacher has either figured out a way to make understanding accessible and exciting to his or her students or a teacher is being gravely misunderstood, is not able to break into his or her students' understandings, and so is not captivating them and engaging them.

At the end of the day, both teachers and businesspeople suffer or thrive to the extent that they are able to be understood by, and to understand, others.

You're carrying around all the tools you need to make a difference – to teach.

AFTERWORD: HOW WE DESIGNED THIS READING EXPERIENCE



Now that you have read this book, you should better understand our overall thesis. In our own experiences working in and around schools and businesses, we have found that the best leaders, the best service-oriented professionals, the best salespeople, and the best trainers are those who do – either by instinct or by conscious effort – what the best teachers do in effective classrooms. We wrote this book to help those in and around business – and serving in those roles – to better understand the best teaching and learning practices and the related opportunities for improving business practices.

There are a few things (or lists) that we believe will help you understand our “learning experience design” and the intentional choices we made throughout the book.

Scholarly Practices

We deliberately used some scholarly practices in how we approached this work:

- We aligned to a research methodology – design-based research – by which we constructed theories, tested them in the field through our own experiences, through analyses of historical and contemporary (at the time of writing) events, and through our conversations with experts. Then, we went back and refined those theories and repeated the process.
- We used an academic reference style not only to credit the researchers or literature domains from which we increased our own understanding, but also to leave a breadcrumb trail for people to follow in case they wish to pursue more deeply an idea or perhaps challenge our interpretations.

Educational Research Practices

We used 10 educationally researched practices to connect our observations and insights to corporate environments:

1. Preassessment

- Asking the right questions up front to understand where customers are in their individual or company journey; using that information to prepare for interactions and transactions with those customers.

2. Formative assessment

- As things develop, adjusting plans or information based on needs.

3. Understanding by design

- Defining customer or company goals and then working backwards from there, intentionally tying every move to the goal or goals.

4. Design thinking

- Being able to iterate, at scale, any/all kinds of motions to continually improve processes.

5. Active/visual listening

- Demonstrating to the other members of a conversation that you are listening and thinking critically about what is being said.

6. Brain breaks

- Reseeding time and the human brain to allow for processing and stepping away from problems or circumstances.

7. Reflection

- Building in time for reflection, thinking, or application; also, helping to establish the habit.

8. Meaningful, personalized feedback

- After an interaction, demonstrating expertise within a personal message so as to inspire the learner or customer to take action and build upon constructed knowledge.

9. Differentiated instruction

- Depending on who the audience is, being able to reach the same learning goal through different approaches.

10. Storytelling

- Due to the fact that information transmission is no longer relevant, producing meaningful stories that accurately connect intended information and therefore lead people to fill in gaps or set the stage to fill in gaps.

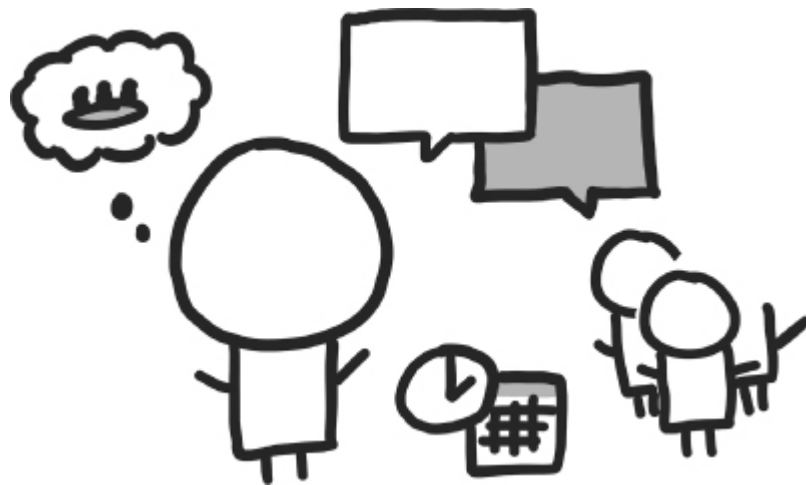
Primary Roles

We also focused on four primary roles throughout the book. For each, we provided a glimpse into our design work, making a more specific “user persona” against which we constantly checked our work. The roles were:

1. **Salesperson:** This persona completed transactions with a customer around a product, service, or good.



2. **Leader:** We used this persona to refer to anyone who has direct reports or who owns the responsibility of a significant area of the company. We also extended this persona to those “unofficial” leaders whom, through their natural activities and outcomes, serve as beacons within their organizations.



3. **Service professional:** This persona represented anyone seeking to provide a service to clients or customers, whether existing or new.



4. **Trainer:** This persona represented anyone with a responsibility for learning and development in an organization.



Paths

Finally, we designed this book so that you might engage with it in myriad ways. Based on our design, there are five paths you may have taken. Ideally, you would have tried more than one, and as a result, engaged with the book in a slightly new way each time:

1. Look for/at the pictures.
2. Skim through and read only the callouts specific to your existing role in an organization.
3. Skim through and read all the callouts.
4. Read select chapters or sections, based on interest or current needs.
5. Read the entire book from cover to cover.

Throughout this book, we visually differentiated the access points to those paths. A quick riffle through the pages should have made it easy to dive in. Also, at the end of each main section of the book, we turned your attention to some of the things that good teachers consider in advance of a learning experience and suggested a few things that, depending on your role, interests, and curiosities, we hoped you would find the time to try.

Instructor Evaluation

The design of any learning experience can only be measured by the near-term and long-term impact and influence on the subject toward meeting the learning objectives. As a result of reading this book, are you equipped to be a more authentic seller? Will you practice more immediacy in your leadership? Will you consider the delight of a customer whom you are serving? Will you better train your colleagues, borrowing from the practices of the best classroom teachers?

We hope so, and please let us know how we did and how you're doing. Send us a note at news@makeyourselfclear.xyz or visit us at makeyourselfclear.xyz. And if Twitter is still a thing when you are reading this, follow us at [@reshanrichards](https://twitter.com/reshanrichards) and [@sjvalentine](https://twitter.com/sjvalentine).

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