Behavior Shift

Exercise #001

Overview

Behavioral Shifts serve as the foundation for you projects impact, fostering team alignment around shared success metrics and nurturing a united goal. This cohesive approach not only enhances team engagement but also instills a sense of collective ownership. As everyone collaboratively crafts the solution, it paves the way for innovative answers to longstanding business challenges. This holistic process educates the team about intricate issues, promoting a data-driven culture, and establishing a direct link between metrics and actionable endeavors.

Optimizing the Behavioral Shifts Impact:

For an optimal Behavioral Shifts experience, it's vital to allocate dedicated time, whether it's a few hours or a full day. Enhance engagement by choosing a conducive environment, perhaps an off-site location, especially for remote teams. Recognize the varying data proficiencies among members, and take moments to clarify the significance of metrics. Throughout the session, maintain a supportive atmosphere, steering the team towards constructive discussions and alignment.

Key Benefits

1. Fosters team unity and creates engagement
2. Amplifies engagement through collective solution-building.
3. Unearths innovative solutions to traditional business challenges.
4. Cultivates a robust data-driven organizational culture.
5. Strengthens the link between metrics and human actions.

How to

Step 1. Brainstorm
Step 2. Group & Prioritize
Step 3. Define Shift Goals
Step 4. Build a Shift Matrix Grid
Step 5: Next Up - Prototype, Impact Metrics (OKRs & KPIs)
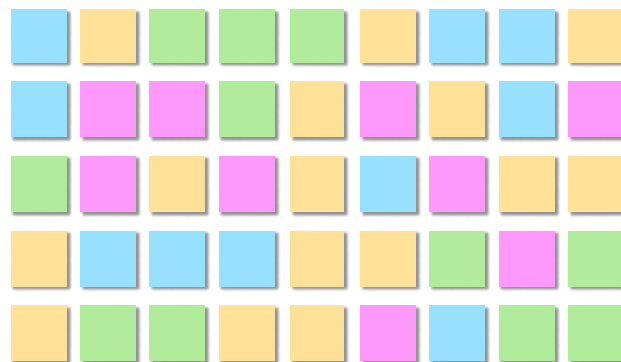
Step 1: Brainstorming

What is it?

Our journey starts by deeply understanding your unique challenges and aspirations. In collaboration with your team, we discern the essential shifts in behavior needed to drive your business forward. These shifts, informed by your aspirations, set our direction and guide our course.

Step by Step

1. Briefly review current metrics with the team.
2. Distribute pens and Post-its to participants, ensuring a wall, board, or large paper is available for postings. (If remote, consider utilizing digital platforms like Miro or assemble mixed small teams with both on-site and remote members).
3. Familiarize everyone with the **Brainstorming Guidelines** before commencement.
4. Present the follow question for brainstorming. *""How might we move the Business forward and surpass our goals"* (Displaying it visually is beneficial).
5. As participants come up with ideas, have them share and post each idea on the board.
6. Focus on generating a multitude of ideas not finial results
7. Time Box ideals only if needed

Brainstorming

Brainstorming Guidelines

1. **Open Mindset:** Welcome all ideas, fostering a space where every voice is heard.
2. **Embrace Creativity**: Encourage unconventional thoughts; they can lead to innovative breakthroughs.
3. **Collaborate**: Use "and" over "but" to add to others' ideas, fostering a positive build-on mentality.
4. **Stay on Track**: Focus on the central topic to maintain a coherent direction.
5. **One at a Time**: Let one person speak, ensuring full team engagement and fostering idea growth.
6. **Visualize Ideas**: Sketch thoughts. Quick drawings often convey concepts more effectively than words.
7. **Aim High**: The goal is volume. The more ideas, the better. Refine and expand on the best ones later.
 8. Everyone Gives :

Step 2: Group & Prioritize

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Grouping (Similar Concepts)

After concluding the brainstorming session, it's essential to pivot from generating ideas to creating actionable plans. A glance at the brainstorming board often reveals recurring themes and concepts. By collaboratively categorizing these similar ideas into clusters, teams not only organize their thoughts but also reinforce team alignment. It's important to note that standalone ideas, while not grouped, remain equally significant in the broader picture.

Step by Step

1. Collaboratively, begin clustering Post-it notes with related concepts.
2. Engage in a team dialogue to understand the rationale behind each idea's placement.
3. Assign a descriptive header to each idea cluster.
4. Not everything needs a group. Allow ideals to stand alone.

Group 1   Group 2   Group 3   Group 4
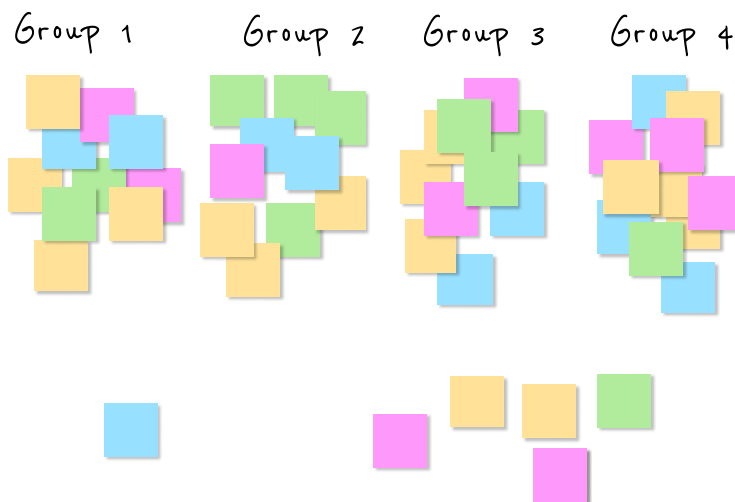
Prioritize (Voting)

Following our productive discussions and grouping, ideas have transformed into actionable concepts. Now, it's voting time. Depending on your team's dynamic, you can choose open voting or a secret ballot. While many digital tools facilitate this step, the objective remains clear: pinpoint the top five concepts that will propel our business and surpass our set objectives.

Step by Step

1. Goal Reminder -"**Which ideas and concepts will help us achieve our goals?**"
2. Voting Allocation: Every team member receives 5 votes; multiple votes for one idea are permitted.
3. Voting Tools: Distribute 5 stickers to each member or utilize a pencil/digital tool.
4. Casting Votes: Place a sticker or mark on the chosen Post-it or title, either on a grouped concept or an individual idea.
5. Review: Once voting concludes, discuss the results collectively.

Group 1   Group 2   Group 3   Group 4

Step 3: Define Shift Goals

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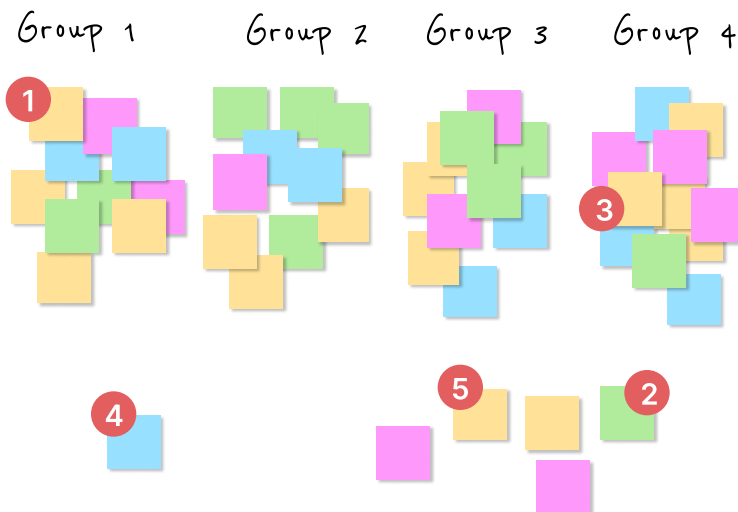
Define Shift Goals

With a clear grasp of our objectives (our metrics) and the most promising strategies to reach them (top 5 ideas), we can now delve into the necessary behavioral shifts. Display the top 5 concepts prominently for the team's reference, prompting them to consider the changes required for their execution. Frame this discussion as a journey from the current state (our existing actions) to the desired future state (our target actions). Engaging in the upcoming exercises will unite the team in modifying their behavior towards a shared goal.

!!! Important !!! A Behavior Shift can be a "Things we are doing" or an "Issue that needs fixed"

Example: Ideal

Reduce Defects

Example: Behavior Shift

Shifts #1

1 Reduce Defects

Current State:

2 Dashboards are being published with mistakes. Each analysis checks and publishes their own work. Each with their own validation process.

Future State:

3 A QA Checklist is developed that addresses Data Validation and Dashboard Functionality. A different Team member performs QA.

Step by Step

1. Set the Stage: Display the top 5 concepts where everyone can see them.
2. Question & Reflect: Prompt the team with, "What behavioral changes are essential to realize these concepts?"
3. From Present to Future: Discuss current behaviors (Present State) and contrast them with desired ones (Future State).
4. Brainstorm Shifts: Collaboratively identify and list specific behaviors to change, even those that might seem challenging due to business constraints or costs.
5. Acknowledge Constraint: Recognize and discuss potential barriers for some shifts, but don't dismiss them immediately.
6. Focus & Prioritize: Narrow down to a focused list of 5-7 key shifts, balancing feasibility and impact.
7. Commit to Action: For each shift, outline actionable steps, ensuring the team aligns on a unified path forward.

Step 4: Build a Shift Matrix Grid

Build a Grid

Now, it's essential to examine how various components of your solution collaborate to achieve the desired results. By clearly articulating and validating your assumptions about your solution's impact, you create a vital tool for deciding which concepts and actions will drive the business forward. With the Shift Matrix Grid, you can align your selected solutions (Ideas) and execution strategies (behavior shifts) to your business objectives. Displaying them on a grid helps the team visualize their collective influence and decide where best to concentrate their efforts.

Step by Step

1. Create a grid with your top Ideas on one side and Behavior Shifts on the other, using a wall, digital tool, or Excel.
2. Position Behavior Shifts at the top and Ideas on the side.
3. For each grid intersection, mark if the Behavior Shift affects the Idea with "Yes", "No", or "Somewhat".
4. Discuss the observed relationships and potential impacts as a team.

Behavior Shifts

	Shifts #1 Team approach to QA Current State / Future State	Shifts #2 Current State / Future State	Shifts #3 Current State / Future State	Shifts #4 Current State / Future State	Shifts #5 Current State / Future State
Idea #1 Reduce Defects	Yes	Yes	Yes	Yes	Yes
Idea #2	No	Yes	Yes	Somewhat	Somewhat
Idea #3	No	Somewhat	Yes	No	Somewhat
Idea #4	No	Yes	Somewhat	Yes	Somewhat
Idea #5	Somewhat	Somewhat	Somewhat	Somewhat	Yes

Prioritize Concepts

Ready, Set, Go!

Having successfully navigated the Behavior Shift exercise, our team is now fortified with shared understanding, engagement, and alignment. Remember, this is just one of countless Human-Centered Design methodologies available during the ideation stage of any project. Our cohesive approach ensures every member is knowledgeable and invested in propelling the company's goals. The next logical step is to transition to rapid prototyping, testing our concepts in tangible scenarios. As we move forward, it will be crucial to fine-tune our metrics and maintain our focus on tracking OKRs and KPIs, ensuring our trajectory aligns with our business ambitions.

Next Up

Prototype: Build Alignment & Reduce Development Time
Impact: Measure Success With OKRs & KPIs