Learning Uncut Episode 82
A Nudge-Led Learning Program – Graham Blaxell and Michael Tan
Hosted by Michelle Ockers

Michelle Ockers:
In this episode we explore using nudges in learning design via a case study about improving the collaboration of a Finance team. This team works in Humm Group, a financial services organisation. After a previous attempt to improve collaboration using a one-day workshop fell short, Graham Blaxell, the L&D Leader at Humm, was looking for a better approach. The approach also needed to be viable given the reduction in the L&D team size in recent years. Curious about behavioural science, he engaged Elenta to help them create and run a nudge campaign supplemented with a one-hour virtual workshop. Michael Tan from Elenta joins us to help tell the story not only of this specific solution, but also share his tips on how learning teams can use nudges.

Michelle Ockers:
Welcome to Learning Uncut, Graham and Michael. It's great to have you here.

Michael Tan:
Thank you

Graham Blaxell:
Thanks, Michelle.

Michelle Ockers:
Let's start with you, Graham, given that today's story is set in your organization, Humm Group. Can you talk to us a little bit about Humm Group, who you are and what you do it for? A little bit of background about the group itself?

Graham Blaxell:
Yeah, certainly. So Humm Group has come out of three years, really, of transformation and moved from an old-fashioned finance company to a modern FinTech, we like to call ourselves. We specialize in buy now, pay later products. We work with credit cards and we also work with financial products for small and medium-sized enterprises, so we have a commercial arm as well. Currently, we have offices in Australia, New Zealand and Ireland, and we're in the middle of a big expansion project into the UK and Canada. As an organization, we’ve been around for about three decades in several different iterations, but the current one is really exciting and hopefully people have seen a lot of big orange birds flying around the cities they live in of recent times. That's our logo. That's Elvis. Not sure why Elvis is a big orange bird, but it's a great look.

Michelle Ockers:
That's interesting. Elvis is the name of one of the supertanker, the aircraft, that is used for

bush fire-fighting here in Australia.

Graham Blaxell:
Indeed, it is, it is.

Michelle Ockers:
... so whether there's any linkage there, I don't know.

Graham Blaxell:
Have to talk to the marketing people about that.

Michelle Ockers:
Yeah, interesting. So of those 30 years, Graham, how many have you actually been in your role in learning and development in the organization?

Graham Blaxell:
So this is my third year. So I'm about a month away from my third anniversary with Humm.

Michelle Ockers:
Right. So you joined when all this transformation was kicking off. Did you join them to help with the transformation, either in terms of, did the company recruit you specifically for that or was that just a happy coincidence?

Graham Blaxell:
No, no, look, it was a bit of a coincidence, but at the end of the day, it's been a wonderful vehicle for Learning and Development to grow and change as well, because as the business has changed quite significantly in the way it approaches the work that it does, it's given L&D a really great opportunity to start changing the way L&D was done as well.

Michelle Ockers:
So can you talk to us then a little about what your Learning and Development team looks like, and perhaps some of the key shifts that you've gone through in the L&D team in the past three years?

Graham Blaxell:
Yes, well, potentially a lot like many organizations, our L&D team has shrunk in the last three years. And of course, one of the reasons I keep looking for new and innovative approaches to present content to our learners is because we have fewer and fewer people to actually develop the content ourselves. So we started looking beyond our own organization to see what support we had and that's where we came across Michael and Elenta. But currently there are just three of us, myself, based out of the Sydney office, and I have two instructional designers who work from Manila. When I came into the L&D team, there were eight of us, so we've gone from eight to three during that three-year period. And we're now part of the bigger organizational development team in the People and Culture department.

Michelle Ockers:
So what's driven the reduction in size?

Graham Blaxell:
It's interesting. Certainly there's been an aspect of COVID involved in it, but primarily because we've changed totally the way the business operates. So the business originally operated as business to business. So those of you who are old enough to remember the first sort of buy now, pay later type products came out of partnerships between our old company FlexiGroup and organizations like Harvey Norman. The 60-month interest free was the original buy, now pay later product. And just about everybody,

certainly of my age, would have bought something from Harvey Norman under 60-month interest free. But for the customer, the exercise was more about, "We're buying this product from Harvey Norman and they're giving us finance." The customer didn't realize that it was, in fact, the organization I worked for that provided the finance. It wasn't Harvey Norman who did that. So it was a business-to-business proposition.

Graham Blaxell:
The big change in the organization now is that we're going directly to customers. So from that white-label, not to be seen, not to be understood by the customer, we're now going direct to customers, which is why there's a lot more marketing around and we've come up with Elvis and we're trying to attract customers directly to ourselves. So that change in the way the business operates changed significantly the needs from a learning perspective of the organization.

Graham Blaxell:
So initially, the learning was around compliance training. It's a finance business, so there's an enormous amount of compliance training. And it was about training our sellers, the people who worked for the third-party merchants. Now it's a lot more focused on our own employees and a broader learning and development agenda from there. So the sorts of people we had in the team changed, the sorts of structure we had in the team changed as a result of COVID, of course, and making sure the business survived through COVID was another aspect of it all. So whole range of different features. But now as part of the OD team, I have a range of business partners, for example, that I can call on to support learning across the business. So it's not reliant entirely on L&D professionals, but we integrate more broadly with the OD team.

Michelle Ockers:
Great. Thanks, Graham. That's really interesting context, which I know we have had some discussions leading up to this, but I wasn't aware of some of that context. And I think that that change helps position some of what we're going to talk about with Michael's help as well. So the other organization involved in today's story, of course, is your organization, Michael, Elenta. Can you give us an introduction to Elenta?

Michael Tan:
Yep, sure. Thanks, Michelle. So we're a VC funded startup, Sydney based. We've been running for about a year and a half now. I think something probably interesting about my co-founder and I is that, whilst both of us are really passionate about learning, neither of us actually come from an L&D background ourselves. So what that means is we don't really have any preconceived notions of how things should be or even what best practice is. So when we started this journey, we really spent a lot of time looking into the current state of L&D, and what we kind of found was, at least from our perspective, a lot of the current solutions were around content delivery rather than actual behavior change. And then there was another problem around scale. So e-learning is typically quite low cost, but probably low impact, especially through human skills and consultants are high impact, but also high cost. And so what that means is that companies generally can't afford to serve all their employees with high impact training.

Michael Tan:
So we really zoomed out and thought about, "Well, what actually drives behavior change?" And we took a lot of inspiration from habit formation apps, even weight loss apps, and anything that really tried to drive true behavior change. And we combined that with our readings in behavioral science, and then what was academia saying about learning transfer? And so what we ended up with was this idea of combining technology, as well as human-to-

human interaction.

Michael Tan:
So we use what we call nudges, and these are short bite-sized interactive learning modules, and these really teach concepts to learners and are delivered on a daily basis through Slack teams or email, and they take people about five minutes to do. And then when someone goes through them, they start to build a habit of that skill that they're learning. Then we also combine that with what we call virtual practice studios. And these are one-hour sessions, which are really around letting learners' practices in a safe environment, under the guidance of an expert facilitator. So that's a product we've built. We've worked with companies all the way from Bupa and Humm, through to a whole bunch of high growth startups.

Michelle Ockers:
I think it's really interesting that you've come into the industry with a fresh set of eyes and you've looked at, "Well, what is happening? What are the challenges in the industry?" And then looked at, "Well, what does the science tell us?" And specifically, you've leaned into behavioral science and you've done your research around learning transfer to address a key challenge that the industry is grappling with. And sometimes I think our expertise can blind us to what's possible. We get stuck in a certain way of looking at things and doing things, but you've come in with this fresh set of eyes and brought in insights from other fields, particularly the behavioral science domain, Michael. So it's really fascinating that you've done that. Do you have any kind of other observations you can share about what you saw when you looked at what was happening in the learning profession?

Michael Tan:
Yeah. A couple of things jump out. One is this idea that not everyone gets to go through high impact learning. So if you look at where people are investing money, typically it's senior executives with maybe exec coaching or facilitating workshops. If companies are lucky, it moves down a level to maybe mid-level managers or new managers, but for the vast majority of companies, it's only pockets of people within those companies that get, "Stop, you need to learn and improve their performance," which seems a real shame. We also think that behavioral skills are really important. If you think about just the rate of change in today's workforce, so new technologies popping up all the time, average tenure is decreasing, what is really consistent for personal improvement is this idea of working with other people well, and so that's the sort of skills that we believe needs to be embedded.

Michelle Ockers:
Thank you. So we're going to look at what this looks like in action for a specific business challenge at Humm that the two of you have been working on together with your teams and that's around collaboration. So Graham, can you tell us more about the business challenge or opportunity that you were looking to address?

Graham Blaxell:
Yeah, certainly. Just before I go there, I'm fascinated by the extent of expertise that Michael and his partner have, based on the fact that I've been in learning and development for four decades, they've been in learning and development for four seconds and they have a wonderful view of how learning operates, remarkable, to be honest. So they've done the theory stuff and moved into the practical in a really, really effective way, and it's one of the things that's attracted me to work with them on this particular project and on a couple of others as well.

Graham Blaxell:
This particular project, it was around our finance operations team. Our financial operations team has about 20 members and they have a really peculiar

workflow. So towards the end of each month, they're absolutely overwhelmed by work because of the way we operate in this business. Towards the beginning of each month, they're just very busy, as they would tell us. So a conventional approach of getting them together virtually or any other way as a team at the one time was almost impossible. The other thing is, they're a team of 20 out of a group of 700 employees. So in and of themselves, they don't constitute a critical mass of people, even though their role is very, very important to the organization.

Graham Blaxell:
So we were looking to try and support them with basically the way they interact with the rest of the business, because they have a view of themselves... In fact, some of the feedback I got from one employee when I asked about their relationship with their customers was that, "Oh, we don't have customers." So there was a real lack of understanding that they actually were a critical group within the organization and their customers were everybody else in the organization that needed something from that team to be done. And there were individuals and potentially a few of them who didn't quite get that. So their ability to work across the wider business was somewhat compromised, I think from their own mindset. We also run an engagement survey twice a year, and there was some evidence through the engagement survey that they were also feeling a little disengaged from the business more generally, again, because I think of this blinkered view of the world and of what they did and how important or otherwise it was to the rest of the business. So that was part of it.

Graham Blaxell:
I conducted a face-to-face workshop with these guys. It would be potentially 18 months ago now. It would have been right at the end of 2019. And we had a great day and we did a lot of really good things during that day, but there was no real follow-up. The old problem of when they got back to their desks in front of their computers, they went on and did their work that they had to do. And the learning we had hoped that was going to be coming out of that session didn't materialize. New information, but no transfer of those skills into their day-to-day work.

Graham Blaxell:
So we had a really unusual work pattern from this group. We had a group who didn't see themselves necessarily as an integral part of the business. And we had a group that we had already worked in a previous situation with some learning with them that hadn't transferred into... They were still having the same problems that they were having at 18 months ago. So it hadn't been successful in that regard.

Michelle Ockers:
So Graham, out of curiosity, in terms of you starting to work to support the team with making a shift in collaboration, was that initiated... Did sort of the finance team leader come to you and say, "Hey, there's something we want you to work on"? Or did you spot the opportunity and engage with them? How did that start, the engagement?

Graham Blaxell:
It was an interesting process because it involved both the enterprise business partner, the manager of the team, the data from the engagement survey. There was a whole heap of things that came together at the same time that suggested that there was some further work that we needed to do with this group. But it started with a conversation with the manager of the group who said, "Look, we had that great workshop at the end of '19, but we still seem to be having the same problem. Can we revisit it and have a look and see what we can do this time?" And obviously, that old adage, "If you do the same thing, you get the same results,"

so we were looking to do something different with this particular group.

Michelle Ockers:
So talk to us about kind of from that point in time of knowing that you needed to do something different to when you actually engaged Elenta. How did you kind of get from that, "Let's do something different," to, "We think we want to work with Elenta," and why did you engage Elenta?

Graham Blaxell:
So Michael and I had already been working on another project and we had leadership using the Elenta platform. And we were evolving our strategy about how to use that during our time together in that leadership project. So as soon as it came up and we started talking within the team about this really difficult workflow that they had, it became very obvious that there was no point in just waiting to have another day, apart from the fact that it hadn't worked the first time. So initially I sat down with the manager of the group and the suggested that I had this collaboration with Elenta and that I thought that would be a good fit, and we discussed that for a little while. I then had a half hour Teams meeting with all of the finance operations team and went through the concept of nudges and how it would work and what we thought might be the best way to introduce the content and give them the best opportunity to change their behaviors along the way.

Graham Blaxell:
So we had that discussion, they were keen to give it a go. They saw the advantages of five-minute nudges, as opposed to what an hour or a day. They saw the advantages of having a regular habit form of going in and having a look for their little piece of learning. And then our follow up was the facilitated workshop at the end. So we could then focus more on the practicality of those skills and that knowledge, rather than just getting that information out to people.

Michelle Ockers:
One of the things I find really interesting about the approach you've taken on this program is that the nudge based learning is happening before you get people together rather than a workshop followed by nudges to embed. So I'm really curious, and perhaps Michael, if you can pick this one up, just to talk a little bit more about, well, what is a nudge? We talk about nudges, but what is a nudge? What does your experience show you, both from the behavioral science, the evidence base, and the work that you've been doing around when nudges work best and how they work best.

Michael Tan:
You actually raise a really interesting point, Michelle, around a sequencing of nudges versus workshops. So one thing we realized fairly early on is that in a lot of leadership skills, or even a lot of human skills, the concepts themselves aren't actually that hard. You can explain to someone what a GROW model is or what SBI is for feedback, but it's all around the practical application of it. So the way we thought about it is that technology is actually really good for explaining concepts, which is why we use the nudges, and then the workshops afterwards is where you actually practice and kind of embed those skills in yourself and they become part of your toolkit.

Michael Tan:
The nudges themselves, we kind of think of them as little interactive pieces. They take less than five minutes to do, and they freely fit into your flow of work. A typical nudge explains the concept. So if I use something like the GROW model from one of our recent coaching programs, the nudge would explain what the GROW model is, and then it would explain each step in that model. So it would say something like, "Okay, so the first step is goal," and then would ask the person to write their own goal. Then it would say,

"The next step is reality." And then it would pull forward that person's own specific goal and ask them to assess reality. Then it would go through an option development process. So this is the person learning the model, as well as applying it in context within a nudge, on an example that is relevant to them.

Michelle Ockers:
And I think that's a key difference, because when you started talking, I was thinking, "Well, is this like microlearning with another name?" But often microlearning is just feeding content rather than necessarily handling application at the same time. So is that application, is that a key characteristic of a nudge?

Michael Tan:
Yes. I think the core difference between what we do and other solutions is that ours is all about interactivity and application. So the way I explained it, then, this is the person applying that new concept they've just learnt within the context of the nudge, but then each nudge also ends with a daily challenge. So this is a person making a commitment to something that they would do that day. So this idea we got from a lot of habit formation literature, where if you do something small on a daily basis, over time, it builds up into a new habit.

Michael Tan:
So for example, one of the nudges is about feedback. The daily challenge on that one was, "Write down the name of the customer." Sort of does a write down the name of the customer. And then we would ask them, "When will you speak to this customer next?" The person would write that down. And then the daily challenge was during that conversation with person A at this time, ask them for feedback. And then at that time we would reach out to that person and ask them if they did it or not. If they did, we'd say, "Okay, cool. How did you go? What would you change? What are your reflections?" If they hadn't done it at that stage, we'd be, "Okay. Do you want to postpone it? We understand you're busy. Let's try again the next day." And we track all of this so we can start to see how many people are actually applying their new skills that day.

Michelle Ockers:
Okay. So let's flip the perspective we're taking on this and, Graham, maybe come back to you. If I'm a participant in this program, what's my experience? Can you talk me through how I'd get these nudges, what they'd be kind of asking me to do, how long the whole thing goes for versus the workshop? Just talk me through end to end experience I'd be taken through.

Graham Blaxell:
So basically we used email, simply because that was nice and simple and straightforward, and people were very comfortable with that medium. Nine o'clock in the morning on a Monday morning, there'd be an email from Elenta but via me that would have the small piece of content, the introduction to what it was about. It would have the practice activity and would have the challenge activity. What's great about this platform, and what I really am very enthusiastic about, is the fact that every response that somebody makes within the nudge is recorded on the platform, and so we can draw back that information at any time.

Graham Blaxell:
So being an old school teacher, it provides me with those memories of the pre-test, post-test era of teaching spelling. So you'd do your pre-test on Monday and your post test on Friday. And Tuesday, Wednesday, Thursday is based on the information you get from Monday to help you get a better result on Friday, really simple stuff. But the technology now is such that we can draw back that information at any time. So on Monday, you said X, Y, and Z. Do you still believe that to be the case on Friday? Have you changed your mind? And it's about the me, it's about the individualized learning journey, because this is done just by the participant themselves, every decision they make, every response they make to

an activity, every time they take on a challenge and complete a challenge, that changes their journey slightly.

Graham Blaxell:
So for me, really the holy grail of learning is about individualized learning journeys, individualized learning paths. I see that as a key strategy in all learning. This technology allows you to do that every day. Every time there's a nudge, it gives you the opportunity for that individual to change their journey slightly. So we no longer have the sort of middle of the room, where we're trying to attract the middle of the room and the top end of the room misses out and the bottom end of the room misses out, because everybody's doing their own journey with their own learning. They're taking the information that's provided, they're applying it to their own circumstance, and then they're challenging themselves with the follow-up activities.

Graham Blaxell:
So we did this Monday, Wednesday, Friday, five minutes from nine o'clock... The nine o'clock was arbitrary. You can do it anytime. It can be done whatever time. We decided to do it at nine o'clock. Email came in, five minutes of information and you could complete it then. Then a new nudge on the Wednesday, a new nudge on the Friday. We did this over three weeks, nine nudges in all. And then the following week was the facilitated workshop, which was an hour, where all of that information and all of the individualized journeys, I suppose, contributed to the design of the workshop because instead of waiting to get to the workshop to actually know where people were at, what they knew, what they understood, what their particular learning needs were, we had all this data from the nine nudges they'd completed to already be able to assess where we were going to best spend their time in the workshop.

Graham Blaxell:
So, for example, when we were talking about collaboration, one of the first questions we asked was to rate yourself on collaboration within your team and rate yourself on collaboration outside of your time. And very quickly, it was very obvious that people thought they collaborated well within their team but didn't collaborate well beyond their team. So straight away, we started to individualize the journey and focus more on the collaboration beyond the team than rather within the team. When we got to the facilitated workshop, it was about collaboration beyond the team, not within the team, because we already knew that was the case.

Graham Blaxell:
Another great part of the exercise was the fact that we could actually present that data. So this is sort of action research, to drag a term from the 1980s, we could present that data to the participants in the workshop. "This is what you said over the past three weeks. This is what you've told us that your needs are. This is what you've told us about the things that you want to learn." And straight away, that engaged people, because they were looking at their own data. It was all anonymous. It was all confidential, but it was their data. They knew absolutely it was their data. So if they chose, of three options, they chose option B for a particular response to the question, we put the data up and 90% of people chose option B. So straight away they knew 90% of their colleagues were on the same page that they were. So they were engaged from the first minute of the workshop because they knew it was about them.

Michelle Ockers:
Michael, I think you're wanting to add something there.

Michael Tan:
Yeah. This idea of learner experience is really core to what we do. One of the insights we had from the very beginning is that you need to focus on the learner.

If you don't engage the learner, you don't earn the right to educate them at a future date. So that's why everything we do is designed to make it as easy for them as possible. And they can choose what days they receive it. They can choose what times. We've had another customer where a bunch of
their employees actually chose to receive the nudges at eight o'clock in the morning, because that's the time when they're on their way to work. They've got half an hour and they're just kind of doing it on the train.

Michelle Ockers:
Right. And in terms of delivery options, what options are available besides email?

Michael Tan:
There's Slack and Microsoft Teams. So that's another thing that we really care about. We don't want people to have to remember new passwords or set up new accounts or download new apps. So if everyone's spending their day on Slack, that's where we appear.

Michelle Ockers:
Now something that you have, I think, both spoken to a little bit is the idea of personalization and taking data that the participants have fed back into the nudges in response to the nudges and then using that. In terms of, like you've got nine nudges in this program, are they all pre-written and made out and programmed and ready to go, or are you adapting and updating and fine tuning in response to what you're seeing from the participants in the earlier nudges? What does that look like?

Michael Tan:
They're designed beforehand, but there's some branching logic in there. So at the start of the process, Graham and I sat down, I showed him what we had. We kind of agreed on what would be included. But from the learner's perspective, it feels like a different experience for every single learner.

Michelle Ockers:
Right, right. Because of the branching.

Michael Tan:
Yeah.

Michelle Ockers:
So obviously, Graham, in terms of developing this, you're still going through an instructional design process. How different or not is the process you go through from an instructional design or learning experience design perspective to create this kind of nudge led learning experience, as opposed to, for instance, the approach you talked about with, "Well, we just ran a workshop"?

Graham Blaxell:
Yeah. Look, it's significantly different. And I've been working with my team to look at what future options we might have available to us, and they've found it really difficult from an instructional design perspective to get their head around it, because it means breaking the content down into very, very small pieces of information. So chunking, as a term, it becomes more tiny chunky, like little bits of information, and then creating some form of activity or interaction for each of those pieces of information.

Graham Blaxell:
So it sort of has that microlearning feel to it, in as much as the tiny pieces of information followed by a relatively simple, straightforward activity to try and apply that new piece of information, followed by the challenge exercise. But it's about having

that big picture, what we want to achieve across the whole series of nudges but breaking it down into bits that we can literally deliver to the participants within a five minute timeframe. So different headspace altogether for the instructional designers, as far as the size and the amount of the content that they're trying to deliver. And then of course, making a link between each of those nudges, today's nudge to tomorrow's nudge to the one afterwards. It's not difficult, but it does require a slightly different mindset around it.

Michelle Ockers:
Is there something you wanted to add to that, Michael?

Michael Tan:
Yeah, I agree with Graham wholeheartedly. This is a new, innovative way of thinking about learning, and it does require a different way of thinking about instructional design. One thing that we're trying to do is to make it really easy for customers, so what we've ended up doing is actually we've built a behavioral framework ourselves. So these are 12 key skills that most people at most companies would need, so things like conflict resolution, coaching, growth mindset. And for each of these, we have built a one month sequence of nudges, as well an associated workshop. And so when we work with customers, we say, "Okay, here's our framework. We'll kind of customize it to what you need." That normally takes about half an hour to an hour, and then the customer is just kind of saying, "Okay, I really like communication? I don't need this. I need this."

Michael Tan:
And so from that, we come up with a subset of programs that we have, and the next step is customizing each of these programs. So that really depends on the customer, but I think what we deliver out the box is typically about 85 to 90% of what customers want. So for example, in a couple of recent coaching programs, one customer, they basically took what we had, but they embedded videos from their CEO. With Humm Group, for instance, a lot of the customization there was weaving in Humm Group's unique values. So the Way We Humm collaboration, we took examples, internal language from there, and that was woven into the flow of nudges.

Michelle Ockers:
So a couple of observations and questions to follow up from that, then. One is in terms of, for the instructional designers, it sounds like it requires you to be extraordinarily discriminating around what content really matters, so getting rid of a lot of the stuff that there's a tendency to fill in and provide more than people potentially need. So how do you go about deciding what content is needed and what's extraneous?

Graham Blaxell:
And that's really important. We've got learners who are, in a lot of cases, let's be honest, overwhelmed. The world is changing so quickly, so much in their area of subject matter expertise changes almost daily. Technology's changing so much along the way. There is so much going on that from a learning perspective and from the perspective of a learners experience, it's about, "Okay, just tell me what I need to know. Don't tell me all the other stuff. Give me a chance to reflect on what I need to know. Give me a chance to apply what I need to know. Give me a chance to think about how that's really going to affect me personally." But being really cutthroat in making sure that it's that significant information that's there.

Graham Blaxell:
When you've only got five minutes, then you have to be like that. You can't afford to do the fill in stuff. It's all about what is the key message? And I talk to my designers all the time and Michael, the same, all the time. The key message we are trying to get across here is this. And we're literally, you distill it down to one sentence. That's the key

message. Okay? So what are we going to do with that key message to help people apply it, reflect on it and be able to work through with it? So that then becomes the practical side that we start to use in the nudge as the activity, that challenge that comes along with it.

Graham Blaxell:
So those three things in the nudge: the new information, the practice opportunity, and the challenge, all become equally important. And from a design perspective, it is that constant repetition of new information, practice, and challenge, new information, practice and challenge, new information, practice and challenge, all within a five-minute period of time. So really quite sophisticated learning design of the end of the day because it's all got to link, each one's got a link to the one before and the one after, and yet they have to be very discrete in what they do.

Michael Tan:
We'd like to get to the point where learning design is kind of a moot point for the customers. So the idea is that we've got these programs, we've put hundreds of customers through them. And so here we can start to really stress test across a whole bunch of different customers, maybe by industry, what sort of exercises work, what the sequence of nudges should be, what the content should be like. And then we end up with really best practice stuff that is ready to go. And then the discussion point with L&D leaders is how do they want to customize it? As opposed to having to build it from scratch.

Michelle Ockers:
And are there any types of content or skills that you think are not suited to this approach?

Michael Tan:
Yeah, to be honest, highly technical things are probably best off handled in different scenarios. I'd probably say that's the biggest one. Again, where we're really focused is anything in the human skills pocket, like communication, collaboration, et cetera. That's really our strong suit.

Michelle Ockers:
Yep, great. I think that's worth clarifying, but there's never one answer, right? There's no silver bullet that we just pull out and apply at any point in time. But particularly because you've only got these short burst of content needs to be something you can explain quickly, they can do something with quickly. So why three weeks? How do you come up with the duration of a nudge program? What drives that? And I don't mind who answers this one.

Graham Blaxell:
From my perspective, it was simply about looking at the big picture, the program outcomes, what we were trying to achieve during that period of time, looking at the content that was required to achieve that and the practical side of how do we break that up into bits so that we can then do the practice and the challenge part of the nudge as well? So for me, it was based around the content, in the first instance. And that works quite effectively because we already had established content, so we had really clear content that we were working with. So it was really a matter of going back to the content, breaking it up into those discrete pieces of information and how we could get to apply those discrete pieces of information. Some bits, we left out. Some bits, we elaborated on a bit further. Michael and I had many conversations around the length of the nudge and how much ticks there was and how much we could put into the one nudge, having faithfully promised everybody that it wouldn't take any more than five minutes.

Graham Blaxell:
So I became a little anal around how long it was going to take, only because that was my pitch to the business about accepting this new approach to learning

was that it was something that you could do quickly. In my head it was, "We're going to introduce this stuff, and they're going to think about it all day," because it's been there at the beginning of the day for them. And as they go through their day, they've got their challenge that they're trying to do and all that sort of stuff and so it's percolating through all day. But from my perspective, it was the fact that we had clearly defined content to start with and it wasn't about three weeks or nine nudges. It was about how many nudges we needed to achieve our program outcomes.

Michael Tan:
So we actually took a habit formation lens to this. So a lot of research says you need at least a month to form a habit, but we took a step back and actually tested a whole bunch of stuff. So we tried two week campaigns and two month campaigns, and we tracked how many learners were going through and completing their daily nudges over both those time periods. And what we found was that the sweet spot was somewhere between three weeks and five weeks for a program.

Michelle Ockers:
Great. And it's great to know that you're continuing to test and refine to make improvements. And that's the beauty of being in the position where you're able to work with a range of organizations, right? You can have a look at the data and test things over a wider range of organizations and see what makes a difference. And I'm assuming that the content in the nudges can be any format, basically.

Michael Tan:
Yes.

Michelle Ockers:
Yeah, yeah. So tell me, what happens after the workshop? So you've got nudges leading up to the workshop, you got the workshop and then what?

Graham Blaxell:
So we still do the traditional nudge approach of having follow-up nudges. It's something that, from a Humm Group’s perspective, we probably need to focus a little more on that to continue to encourage that follow-up from the workshop activities. So a week after, a couple of weeks after, a month after, and maybe even three months after, particularly when they're these human skills that Michael talks about. And in this case, it was around collaboration, so it's not something we're going to get immediate change in. We're going to have to monitor that change over time.

Graham Blaxell:
And I think the way we monitor it is to remind people of some of the things that we asked them to do, some of the things that they committed to having done, getting them to respond to our questions around that. So using the platform, again, to its fullest extent and just following up on a regular basis. Now, Michael and I were talking about this just yesterday and all this can be scheduled in advance. So because of the technology that's available, we can schedule all of this month in advance and it will arrive at a time that we determined for it to arrive. And then we analyze the responses that we get and then decide what's going to be our next step. So that traditional nudge approach also goes into the post facilitated session stage.

Michelle Ockers:
And Michael, what does the evidence say about nudging after a workshop and how does

that affect the work you do?

Michael Tan:
Well, I think zooming up, this might resonate with you guys, but if you think about the distribution of learners within a cohort, you've got a percentage of people who won't do anything, a percentage of people who will learn anything, who are really hungry to learn. I think you've called them “learnatics” before, last we spoke, Michelle.

Michelle Ockers:
Yes.

Michael Tan:
But they're not the mass majority. So really the post-workshop nudges, it's to move as many people at the top of that bell curve a little bit further to the right. So this is why just kind of reminding people of skills they've learnt, weeks, maybe months after they'd been through that workshop and through this nudge experience, it really kind of rings a bell and triggers them to change that behavior or apply that new skill. What we've also found worked really well is if you can make it personalized. So if you're sending nudges a week after the workshop and it refers to an answer that they submitted in the workshop or something that they entered earlier in the program, that personalization actually drives a big change.

Michelle Ockers:
So Graham, when was the workshop? It wasn't that long ago at this point in time, was it?

Graham Blaxell:
Yes, just a couple of weeks ago. Yep, yep.

Michelle Ockers:
Okay. So it might be too early to actually see how people's behaviors have changed, although it's been going on for... If it was two weeks ago, five weeks ago, the nudge campaign started.

Graham Blaxell:
Yes.

Michelle Ockers:
What have you seen shift in that time? What's the early signs of impact of this approach for the collaboration of this group?

Graham Blaxell:
Look, the most obvious thing from my perspective was the way people came and attended the workshop. So those people who had committed to doing all of the nudges, or at least the vast majority of them, they turned up to the workshop pretty inspired and engaged from the opening minutes. So they were there really to talk about the things that had happened in the nudges. They were there to discuss with their colleagues what they had learnt, and they were there to share their experiences. So we only had 60 minutes. We did it that way deliberately because of the nature of the group and their workflow. And first and foremost, they were there ready to learn, right from the very beginning, which was awesome. But we had some specific, I mentioned earlier, one of the participants who had said, "Oh, we don't have any customers." That particular participant, by the end of the workshop, was spruiking all the things that he could do to engage more with his customers. Yet the three weeks, four weeks earlier, he had said he didn't have any customers. So there have been significant

changes in that regard.

Graham Blaxell:
The workshop focused on individualizing the plans and processes moving forward, what people were going to do next. Everybody at the workshop came up with a plan. They came up with what they were going to work on. They came up with what part of the business they were working on. They came up with a timeframe. Because all that work had been done before the workshop, they could actually walk out of the workshop after 60 minutes with a complete plan of what needed to be done. So those sorts of practical things, that transference of learning into their real, everyday work. This wasn't extra they had to do. This was actually something that they needed to do.

Graham Blaxell:
And we have a term we use at Humm, "besotted customers." So we use the term besotted customers with these guys, as far as their internal customers. What do you need to do to make your customers besotted with your work? And because that was part of the language of the organization, that resounded really well with the group as well. And so lots of positives from that perspective, around the way they turned up to the facilitated sessions, the way they were able to actually use the information that they had already been given, instead of spending maybe 30, 40 minutes of the session trying to deliver the new information, the new knowledge, they came with that there. So the facilitated session was all about the discussion, the debate, the delivery of what they're going to do next.

Michelle Ockers:
And it's not just that they had the knowledge, but they'd had some experience that they could draw on, some very targeted experience to reflect on and to apply so it's a better informed action plan.

Graham Blaxell:
Yeah, absolutely.

Michelle Ockers:
So I think what we'll do, I'll stay in touch with you, Graham, and perhaps in three to six months' time, we'll add a bit of a postscript to this episode to see where things have landed given the passage of time.

Graham Blaxell:
Yep, that would be lovely.

Michelle Ockers:
Impact is always important to know about. So let's start wrapping up. Graham, what went well and why do you think it went well?

Graham Blaxell:
Look, I think that the concept of the nudges for something that was a brand new approach to learning in the organization was really well accepted by this particular group. And partially that was because they felt people were listening to them, that we were listening to them, from they have this outrageous sort of rollercoaster ride of their workflow. And then they get this invitation to go to some learning experience, stuck in the middle of the worst part of the month for them. And they just can't get go. And they get a bit jaded and a bit, "Well, we tell them we can't do anything in the last two weeks of the month, but that's when they always put on the learning bit." So this was about us being able to say, "Well, we've listened to what you're telling us. And what you're telling us is that you don't have just time to drop everything that other parts of the business might have, and so we're listening to what your needs are and being able to do something specifically for you." So I think that

was a great success.

Graham Blaxell:
The other great success, as I'd mentioned, was the way they then turned up to the facilitated session with all of that experience behind them so they could actually make more informed decisions about it. I think that was great as well. The other sort of hopefully intended outcome, but it actually worked, was they'll be very open to this approach again. So this isn't a one-off. This group of people are quite engaged with this process now, with this approach, and they will be happy to do this again. And they'll be happy to tell their colleagues about a different approach to learning something that's going to happen in short, sharp bursts, something that they can plan and manage themselves as something that's giving them time to apply and reflect. I think all those things are positives.

Michelle Ockers:
And is there anything you'd do differently next time?
Graham Blaxell:
There probably are things that we would do differently. I think I would spend a little bit more time... I had one session with the team before we started. I think I'd spend a little bit more time if it was a brand new team that I haven't spoken to before about how the process works. Certainly not differently because we haven't moved that way yet, but one thing that we hadn't necessarily planned on was just how much follow up we were going to do. Certainly we're going to do more follow up now, and in future, that will be part that we'll embed into the process. So there'll be the pre-session nudges, the session, and the post-session nudges all scheduled out over potentially a period of three to six months.

Michelle Ockers:
Yeah, great.

Graham Blaxell:
So those would be the things that I'd probably do differently.

Michelle Ockers:
Okay. And Michael, what tips do you have? We may have listeners here who maybe they've done a little bit with nudges. Maybe they haven't had the start point yet, they haven't started using nudges. What tips would you have for others working in learning and development who'd like to get started or do more with it?

Michael Tan:
I think, even if I reflect on this collaboration project that Graham and I worked on, and I take it back to debrief, these people, they were time poor. They needed practical content. So this was not about theory or sort of about certifications. It was genuinely around behavior change and performance improvement. And that's the area that I think nudges are actually the most useful in, where you can deliver short, sharp content bites, and you can use them over time to start to actually build habits. So my tip would be to be learner obsessed, and to make sure that your teachings and your programs weave into the workflows of the people that you're trying to uplift.

Michelle Ockers:
Fantastic. And that's interesting, you've used the term learner obsessed. Graham's talked about being customer obsessed. So I think really getting into the shoes of whoever it is you're trying to serve seems to be a common theme there. So I'm going to include a link to both your LinkedIn profiles, as well as both company's websites. And we'll look at some other resources, particularly around behavioral science and nudge theory. And maybe Michael, if you can share some of the resources you've found really useful to inform your understanding of behavioral science and habit change, we'll add

those to the show notes.

Michael Tan:
Yep.

Michelle Ockers:
And if people would like to follow up directly with either of you, there's websites and there's LinkedIn profiles for them to do that. So thank you both so much for sharing your work on this program and your insights with us. I think people are going to find it super useful.

Michael Tan:
Thank you, Michelle. Thanks for having us.

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About your host, Michelle Ockers

Michelle is the founder of Learning Uncut. She is an experience, pragmatic organisational learning strategist, L&D capability builder and modern workplace learning practitioner. She also delivers keynotes, workshops and webinars for learning and broader professional or workforce groups at both public and in-house events.

Michelle received the following prestigious industry awards in 2019:

- Australian Institute of Training and Development Dr Alastair Rylatt Award for L&D *Professional of the Year – for outstanding contribution to the practice of learning and development*
- *Internet Time Alliance Jay Cross Memorial Award – for outstanding contribution to the field of informal learning*

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