

**Learning Uncut Episode 72**  
**A Risk Management Solution that passes the Water Cooler**  
**Test – Rachel Gillott**  
**Hosted by Michelle Ockers**



**Michelle Ockers:**

My guest today is Rachel Gillott, the Senior Learning and Development Business Partner at Shine Lawyers. On the surface of it this is a dry topic – it's about risk in the legal industry. Of course, risk management is a business need that many L&D professionals provide learning solutions to support in their organisation. Often there is a mandatory course or eLearning program that is rolled out organisation-wide, consuming a large chunk of workforce time. While things are shifting with the way we design such programs, there is still a tendency to be information-heavy, unmemorable and completed as a one-off event.

Rachel and her team at Shine took a different approach – consistent with one of their organisational values which is 'dare to be different.' When she was asked to develop a learning solution over three years ago Rachel formed a working group with management representation and undertook an organisational needs analysis. She also engaged their Professional Indemnity insurer in a partnership that has continued with the L&D team ever since. This is an excellent example of working effectively with internal and external partners and looking beyond knowledge and skills to make it easier for people to adopt desired behaviours.

The learning solution is multi-faceted to cater for differing levels of experience with risk management across the workforce. It has continued to evolve and now includes periodic campaigns conducted at times of heightened pressure, and sessions provided by the insurer drawing upon their broader visibility of industry trends and incidents. It also includes a super-hero comic strip look and feel eLearning program where participants get to pick their own avatar and support other characters to stay out of trouble. Rachel talks about how she gained agreement to take a fun approach to a serious topic – with great impact.

The result is a learning solution that has people talking about the subject at the water cooler, and taking more conscious actions to manage risk.

Before we start our conversation with Rachel, I'd like to briefly mention the Emerging Stronger Masterclasses, which I'm hosting in April 2021 with Laura Overton and Shannon Tipton, my co-hosts from the Learning Uncut Emergent podcast series. After the upheaval of 2020 L&D is now at a critical juncture where we have the opportunity to consolidate and leverage the shifts we've made. If you are an L&D leader seeking to create more business value and keen to gain the support of industry experts and progressive peers to achieve this then head over to [emergentmasterclass.com](http://emergentmasterclass.com) for more information.

**Michelle Ockers:**

Welcome to Learning Uncut, Rachel.

**Rachel Gillott:**

Thank you very much, Michelle. Lovely to be here.

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**Michelle Ockers:**

It's nice to have you here. And of course, you're actually in my home city in Brisbane.

**Rachel Gillott:**

Yes, yes, it's nice to be in the neighbourhood.

**Michelle Ockers:**

It is. It is. You work for Shine Lawyers, Rachel. Would you like to tell us a little bit about Shine? Who they are, where they operate, what sort of work they do and who for?

**Rachel Gillott:**

Sure. Shine Lawyers is a litigation law firm, and we stand up for the rights of the average Australian, and our clients come to us to right a wrong that's happened in their lives. We practice across a diverse range of areas of law, including personal injuries, medical negligence, abuse law, class actions, disability and superannuation. Just really to name a few there. And our L&D team is responsible for the learning and development of all of our practice areas. We want to be where our clients are. So our 700 people are dispersed across 40 offices and four states. And our L&D team of 10 people, we're centrally located in our head of office, but also at our purpose-built residential learning facility near Toowoomba, in Queensland.

**Michelle Ockers:**

Right. So 700 people, over 40 offices, that's a lot of offices, isn't it?

**Rachel Gillott:**

It is. It is. We're quite geographically dispersed, because we want to be, as I said, where our clients need us.

**Michelle Ockers:**

Okay. And the nature of the roles, obviously, you have lawyers, but for someone who's not fortunately had to have a lot to do with lawyers and the law, what kind of roles are there? Are there different types of non-legal roles in the business? Are there other roles that you support?

**Rachel Gillott:**

Definitely. We support the entire business. So we've got our legal roles, as well as our shared services roles. I'm an example of a shared services person. We've got marketing, IT, finance and many other shared services areas. From a legal perspective, our legal teams have a legal manager, a variety of experience in our lawyers from early career lawyers, to very senior experienced lawyers. We also have paralegals that work quite closely with our lawyers and administrative support, that are integral in that legal team.

**Michelle Ockers:**

Okay. And we're going to talk about a topic today, an area in terms of the business need, that I imagine would touch most people in the organization, and that is risk management. In

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many industries we deal with risk, but the flavour of it varies from industry to industry. So can you talk to us a little about what the nature of risk looks like in the legal industry?

#### **Rachel Gillott:**

Yes, definitely. Law is quite a complex profession. And even lawyers who specialize like ours do, they need to work across multiple different and quite complex pieces of legislation. To give you a context, several of our key acts are upwards of 300 pages long. And one lawyer might need to be across four, five, seven of those, depending on their practice area. Now, each of these legislations have imposed various time limits on our actions. And if something hasn't been done on time, or it doesn't meet all of the requirements of that action, then there is a risk of adverse impacts. So it's really important that our people understand these risks and mitigate them, because as I said, our clients are the everyday Australians, and they've been impacted by something that's truly changed their lives. So we take that responsibility really seriously. And one of our key values is to stand up for the little guy. We want to do everything that we can to ensure that their experience with us is a positive one, and that we manage these risks on their behalf.

#### **Michelle Ockers:**

So it's not just about the organization and its staff, but it's very importantly about looking after your customers and minimizing risk to them.

#### **Rachel Gillott:**

Yes, definitely.

#### **Michelle Ockers:**

Clearly, this is something that as a law firm Shine has been managing on an ongoing basis for a considerable time. Why was there a decision made to create a new learning solution or to revamp the existing learning solution?

#### **Rachel Gillott:**

Well, this learning program was born from a need to avoid simple mistakes. It focuses on those common risks that we've identified in our 40 years in the industry, but also with our partnership with our professional indemnity insurer. Our goal was to bring awareness to the risk areas, and also to identify strategies to minimize them because our area of law is quite complex, and there are a lot of facets that our lawyers need to be aware of, and we wanted to give them strategies that they would be able to hone in on what they needed and mitigate that risk by implementing systems and processes or leveraging the ones that we have that would enable that risk to be reduced.

#### **Michelle Ockers:**

You touched on something really important there, that this isn't about knowledge and skills. That risk management is also very much around systems and processes.

#### **Rachel Gillott:**

Definitely, that's a really big part of the approach to risk management. It's multifaceted in any business, I'm sure, but definitely in our way of approaching it.

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#### Michelle Ockers:

You've identified an opportunity to revamp the learning approach or the learning solution. How did you go about analysing the need? You're invited to take a fresh look at this, what did you do to figure out what was required?

#### Rachel Gillott:

Well, we were asked to develop a learning program which would reduce our risk and do that by highlighting the risks that we face and the strategies that you can use to mitigate them. But what we did, instead of the training needs analysis, we actually implemented an organizational needs analysis. And this enabled us to consider the business processes that were aligned with managing risks, and also look at externally around the industry to gain more insight into the risks faced by our industry.

#### Michelle Ockers:

Who was involved in the analysis and how did you go about it, Rachel? Unpack that process for us, because I think that's quite an important part of what you did to set this up for success and not just race in and say, "Well, here's a new training program." Right?

#### Rachel Gillott:

Yeah, definitely. We brought together a working group, and that included lawyers across various states and practice areas. We also had one general manager who is passionate about this area of risk, and we engaged with our risk and audit manager. So we had a really good cross section of the business. And that enabled us to... Our recommendations were more robust, and they were able to be relevant to more areas of the practice, and they were accepted more readily because we had that backing of that good working group.

#### Michelle Ockers:

So partly, it was about buying, but also obviously, about tapping into the knowledge and experience of the people in that group. What sort of questions did you have for the analysis and how did you go about getting answers to those questions?

#### Rachel Gillott:

We leveraged the information that we had within the heads and the minds and the teams of those people in the working group. Initially, we were on a big fact-finding mission. We wanted to know what knowledge our people needed, what we had written down of that, what was our business process, and how was it being implemented? What was our system? How did our system support that process? And then we're able to also look at where are the gaps? And are there any differences across different states or different teams?

#### Michelle Ockers:

What were the key findings out of that, Rachel?

#### Rachel Gillott:

The key findings were that we had great strengths, but we also had some opportunities for improvement and reinforcement. We had significant knowledge in our long-standing lawyers, but this topic wasn't included in our induction program. So that was a key opportunity for us. We'd recently implemented a new IT system that helps our legal teams to run their cases. And what we realized was that not everyone knew how that system could support them. So we'd highlighted opportunities there. Also, around that business process, we actually engaged with an external partner on this one, and they were able to provide us with greater insights into where things go wrong and why they go wrong. What was that tipping point?

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We partnered with our professional indemnity insurer. They're a leading indemnity insurance in Australia, and they've got great knowledge and insight, not just into the statistics of risk, but into what went wrong, how it went wrong, and what would have made the difference. So we're able to leverage that, in that early discovery piece. And obviously, also through the rest of the project.

#### Michelle Ockers:

It's a great example of bringing the outside in because of course, that partner would have been very attuned to what was happening elsewhere in the industry, what issues commonly tripped people up and other organizations that they could come in and take a look and say, "It's almost like a risk assessment of your risk process." Right?

#### Rachel Gillott:

Yes, yeah. And it meant that our recommendations were really robust. And that when we were talking about the learning program that we delivered to our people, it hit the mark and it had that backing. So it had a bit more gravitas, having that backing there from our professional indemnity insurance.

#### Michelle Ockers:

Yeah, it's not a good look when you roll out a program to develop knowledge and skills and then there's other things that are getting in the way of people actually applying those knowledge and skills and systems don't support them, or there's something in the culture that detracts or makes it hard for them to apply that behaviour. So it sounds like you were looking really holistically at that. Were there some changes made alongside the learning solution so that it was like a more integrated solution then?

#### Rachel Gillott:

Yes, it was. We were really pleased that our full recommendations were accepted. And that included improvements to the business process, to the way we use our system, even improvements in our system, in the management and the processes around managing that risk. And it also enabled us to build a campaign, which included learning programs, but also included focus areas for the business at key risk times during the year.

#### Michelle Ockers:

You've got my attention with the word campaign there, Rachel. This should be fairly interesting. I get a lot of requests from listeners asking, "What do campaigns look like? How do you put together a good campaign?" So I think we're going to be able to talk about a real world one here, which is awesome. In terms of the learning solution, can you describe a little bit more now that we've kind of narrowed down it's one of a number of initiatives as part of an overall body of work. Who was the learning solution for and what were you looking to enable in terms of the behaviours you wanted people to take?

#### Rachel Gillott:

Well, our target audience was quite broad. It was our entire legal team. And that covers people who are just starting out in their legal profession, to our most senior lawyers. And also those people that are supporting them and sometimes it might be their first role within a law firm. So we had quite a breadth of experience that we needed to manage and we needed to respect it as well. We needed to respect that our senior lawyers know a lot of the facts around what are the risks, how to protect those risks. But what we heard from our professional indemnity insurer is that the crux of many of the issues that they see is based around in it won't happen to me mentality. And that's human nature because we don't plan to

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make a mistake. We research, we study, we become masters of our trade, and we don't expect mistakes will happen on our watch.

But it's also human to make mistakes. What we needed to do there is raise awareness that this, it won't happen to me mentality is actually quite risky in itself. And that we needed to be able to step back from that, have a look at our risks, how to mitigate them, and what are the systems and processes that each individual can put in place, as well as the business, that will mean that we can take that pause and review what we're doing and then take a step? That might be instinctive, but sometimes when we're in that instinctive mindset, we have blinkers to see some of the things that are there that we would be aware of, if we were able to take that pause.

#### **Michelle Ockers:**

I like the way you've explained that it's not complacency, it's not lack of care ... it's like unconscious competence almost. Like when you get in the car, and you drive that route that you've driven so many times before from A to B, and you get to the other end and you think, "Oh, how many traffic lights were red? Where did I stop? Did I turn off at the..." When you go on to almost autopilot because something is so familiar, particularly if something changes and I imagine from time-to-time legislation changes as well. That we're just not... Our brain's not putting resources into watching those things because they are so natural to us so that I can see where there would be risk of error through that.

#### **Rachel Gillott:**

Definitely.

#### **Michelle Ockers:**

In terms of looking at how do we create a solution that's going to be effective for people at these varying levels of knowledge and expertise. So it's got to be respectful. It's got to be relevant. It's got to be engaging. What were some of the design considerations or constraints in your environment? And how did you go about addressing those?

#### **Rachel Gillott:**

Well, obviously, you did share one there around the difference in expertise. We also need to be mindful that our target audience are very busy people. And they're busy working on our clients' bars, and building great, great experiences for our clients and great outcomes. So we needed to manage that, both from a time of learning program perspective, but also in working with our subject matter experts, because most of those had clients, and rightfully needed to focus on them. So we needed to be able to build what we could internally inside L&D and raise it to them for review, rather than going to them to build the entire product. So we do aspects like that, and also keep the learning to be very targeted, very, very real-world examples, very focused on the team, as short as we could, but still ensuring that we maintain that level of engagement.

#### **Michelle Ockers:**

Okay, let's get to the fun bit. What did the solution actually look like?

#### **Rachel Gillott:**

Great. Respecting the different knowledge, we wanted to address that first and foremost. So we worked with our subject matter experts, most of those in our working group, but we also did pull in a few others. And we built fact sheets. We made the complex simple by creating tables that listed all the key dates under each legislation that our lawyers need to be aware

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of, and provided information like how's it calculated, how's it protected, what's the impact? So that our seniors, they would know that and they could just refresh their knowledge if they needed to, or if they're working across a practice area, into a different state, they could pull that up if they needed. That our juniors would really get into the nuts and bolts of that. And it might also prompt a discussion between them and their manager, so that they have that level of knowledge. That gave our people that baseline knowledge that we needed to leverage.

On top of that, we documented our systems and processes from an IT system perspective, but also the business process perspective. And we're able to inject into that the expectations and the timeframes that the business wanted to re-refocus on around those. We also built a learning program. So there is a learning program in all of this. And we built that mainly for our induction program, but we wanted to make sure that the learning had the impact and longevity. And that's where this campaign came in. Because we knew this is a really complex area, and simply providing the resources and having a great learning program, it wasn't enough to maintain. We wanted that maintenance. And so the campaign brought in things like focus challenges that came to the business at key risk times during the year. We knew what those were from our experience, but also in consultation with our indemnity insurance, they were able to provide some really good information around that.

#### **Michelle Ockers:**

Can you give us an example of what a key risk time might be in the legal industry that you would run a campaign activity against?

#### **Rachel Gillott:**

Definitely. The major two are really at the key focus times of end of year and end of half year, because we get really busy around those times, and also people take holidays. So the risk focus challenges were around being proactive, and recognizing that during those periods of the year, our teams are going to be more focused on the here and now because they need to be, they need to achieve the great results for our clients. Many of our clients want their case resolved before Christmas. So there's a big focus there. But if we can step back and look forward, then we can see with a clear lens, not a lens that's really busy in the here and now. But with a clear lens, we can see what we have coming up and we can plan for those so that we don't come back from leave and realize that we've got a very short amount of time to do something and we can be more proactive around that.

#### **Michelle Ockers:**

What does a focus challenge look like then, Rachel?

#### **Rachel Gillott:**

Well, it asks our teams to do some really practical things: take some time, look at your files, look at these key risk areas, consider your file from these. And look at this period of time, do you need to do anything now or even block time in for future because there is what we call a key date coming up in that period of time. So it's quite practical. The major thing is just to take the time to step back out of your day to day and take this long-term focus.

#### **Michelle Ockers:**

Yeah, so it's like a nudge campaign almost.

#### **Rachel Gillott:**

Yeah, definitely.

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**Michelle Ockers:**

And was it just distributed through communications? Were there any particular techniques or tactics that you used?

**Rachel Gillott:**

Early on, we built a poster, we developed a poster, which was a lawyer-looking type, someone in a suit, walking on a tightrope and they were blindfolded. So it was prompting people, it's eye-catching and prompted them to think, "What might I not be seeing right now?" That helped that focus. And we deployed those campaigns through communication from our senior legal leaders, to their general managers, and to their legal practice managers. And also email communication as well. So it was verbal, email, they were the posters to capture our attention.

**Michelle Ockers:**

Yeah, I love it. And that kind of approach has got applicability in many industries. Wherever you've got... And most organizations have some sort of compliance training, and it's not a matter of do it once and then you tick the box. If you actually want behaviour to change, you need to be thinking about the environment. We know this from behavioural economics. You need to be thinking about the environment to make it easier, and simpler, more straightforward for people to actually take the right action. Well done on picking up on that.

**Rachel Gillott:**

Thank you.

**Michelle Ockers:**

What else would you like to tell us about the solution? Is there more to talk about in terms of the campaign approach? Would you like to talk about induction and what that looked like?

**Rachel Gillott:**

Yes. We did develop minimize risk for our induction program and we had great success there. I knew we'd created something great when I started hearing some of the parts of the program being spoken about around the water cooler. That's really rewarding from an L&D perspective, when you hear people talking about what they just learned in their program, especially when we're talking about risk management, and it's not the topic you usually hear around the water cooler. That was really rewarding. And that actually prompted a request to L&D to actually provide this to all of our people. It was developed just for induction, but we actually took it out to each of our offices over the next few months to provide that experience to them.

**Michelle Ockers:**

I think we've just come up on a new standard for learning programs here, Rachel. The water cooler worthy standard.

**Rachel Gillott:**

Yes, the water cooler test.

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#### Michelle Ockers:

What makes something worthy of the water cooler? What was it about the program, you think, that got people talking?

#### Rachel Gillott:

Well, what I heard was people talking about what was the real impact of risk on our clients and on our people. I think that in the learning program, we spent a bit of time on that because we needed to break through this, it won't happen mentality. So we spent a bit of time on; well, it's really important to focus here, because this is what happens to our clients and then into our people when we don't manage risk. And that's I think the reason that it was so successful.

Also there are real world examples that we were able to integrate in there in connection with our professional indemnity insurer. People were able to imagine that it was happening to them without it actually happening, which is the perfect scenario. They were really able to put themselves in that position and realize how the systems, the approaches that we were talking about, would enable them to better manage that risk.

#### Michelle Ockers:

Okay. I think that sounds like it's getting to the heart of that, "Well, it won't happen to me," because there's plenty of examples how it has actually happened to people, well experienced people.

#### Rachel Gillott:

Definitely, definitely. And it doesn't matter your experience. From what our indemnity insurer was saying, it happens to everyone. That was a key message.

#### Michelle Ockers:

When did you roll it out? I don't think we've talked about timing.

#### Rachel Gillott:

We rolled it out initially in early 2018. And that was when we implemented it into the learning program. And then shortly after, we took it across the business. In 2019, we actually redesigned our program, because we had highlighted a strategic need to move our induction to online. We did that-

#### Michelle Ockers:

Good timing.

#### Rachel Gillott:

Yes. I was thinking, hindsight, very good timing. So we didn't have to reallocate our focus when our workforce went to work from home. When we decided to move it to e-learning, we took the opportunity to look at the design a little differently. And we wanted to keep the high quality, the high engagement, but we didn't want it to be just another risk management e-learning course in a catalogue of e-learning that was quite lengthy for our new employees. So we approached the design differently and we implemented a comic book aesthetic, where we literally gave our learners a superhero cape, they were able to choose their avatar, and they were sent on a mission to save the Shine world. They met a couple of lawyers, and they're able to help those lawyers, as they experienced, solved, and then learnt from some mistakes.

And along the way, our learners built their utility belt of weapons. I must say our e-learning designers really pulled out all the stops to build this creative, fun design that really did stand

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apart from all of our other programs. It pulled people's attention in because it was so different and fun. And you don't normally put fun and risk together.

#### Michelle Ockers:

No, in fact, it's almost... Well, are you making light of a serious subject? And is that okay? It was your challenge there, Rachel.

#### Rachel Gillott:

Yeah, definitely. And we did take that quite seriously. I remember when our e-learning designer came to me with this wacky idea. We like wacky ideas. One of our values is to dare to be different. We do push the boundaries a little, but I was conscious, was this too much? Was it too much? I really bought into the reasoning behind it. I could see that it would stick with our people. It would be a topic of conversation. And if you can achieve that in risk management, I think that's like the gold because information and awareness builds power in that area. So I really was passionate around being able to get this across the line. We developed a little demo of what it would feel like. We had the comic book aesthetic. We had some audio and some soundtracks in there. We've got the whoosh of the cape. We developed that and I took our senior leaders through it.

I explained to them reasoning behind it and the benefits of this different design, and they put their faith in us to produce something that was pretty special. I'm really pleased to say that we did. We are very proud about new minimize risk program and all that we've done in this space.

#### Michelle Ockers:

Did you face any resistance from the leadership team, any concerns about the use of the superhero theme and the kind of approach you'd taken?

#### Rachel Gillott:

Look, I don't think it was a quick decision to make. It might not have been the cup of tea of everyone, but they could understand the reasoning behind it and understand the benefits of that different design. And so we were able to receive that approval to do that bit of a definitely daring to be different design.

#### Michelle Ockers:

Yeah, nice. It's good when you have enough trust from your senior leadership team to try something different. And this isn't the first time on Learning Uncut we've had a guest who's talked about using the superhero theme for e-learning. Debbie Key from Forty Winks, they've used the superhero theme. They made up their own superheroes and they use them... I think they've got from memory, about four, and they each represent a different portfolio of learning.

#### Rachel Gillott:

Oh, great.

#### Michelle Ockers:

The superheroes' qualities, they might have a whole backstory, and the qualities and characteristics of the superhero relate to that particular portfolio if you like. But I think it's one of those things like in terms of fitting with your culture, you've got to tread really carefully and make sure that you've got that alignment, and it's going to work right and you need a senior leadership team who trusts you, which clearly your team did. The Forty Winks leadership team trusted Debbie with this and they were willing to give her some space to try it.

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It sounds like it worked well. What happened? Did you go do a pilot? Did you just go straight out and launch after you'd put your leadership team through it? How did you continue testing the waters around this?

#### **Rachel Gillott:**

Well, we only showed them a little bit to give them a feel for it. So we did then need to build the program out. And I worked with one of our key legal general managers here in Queensland to do that. I built the storyboard with our e-learning designer, and then took her through it. And we're able to sense check many things. There were some times that we did actually pull back a little bit, because we needed to, as you said, walk that line between being really relevant, and taking a fresh approach and being a little too comical. So we did need to do that. And we were very aware of that, because we didn't want to go the wrong side of that line. We worked with her quite closely to build that storyboard out, and to make sure that it would hit the mark for everyone. And we actually built the program with internal resources.

Our e-learning designers are a little bit of L&D superheroes themselves, they leveraged their knowledge of audio manipulation, they got a great soundtrack to put to the program to build suspense. Our L&D people lent their voices to all of the characters in the program and we're able to build different engagement strategies in there to keep people interested in finding out how they were going to save the Shine world.

#### **Michelle Ockers:**

Can you give us some examples of those engagement strategies?

#### **Rachel Gillott:**

Well, as people first go into the program, they actually choose their own avatar. And that avatar stays with them through the entire program. We had a narrator, who guided the learner through the entire experience. And we had different characters throughout the experience, where they would go and see the professor, or go to the commissioner to get some sage advice, and they'd come back and apply that. And those people, those characters, spoke directly to the learner. So it really pulled people into that experience as if they were actually helping a colleague who needed to solve an issue. And they were actually building their own little utility belt that they would be using in the future.

#### **Michelle Ockers:**

Okay. In terms of longevity of something like that, is this something that people do once? Is it something that you've continued to build upon? Because obviously, a lot of care and thought went into this, a lot of effort. And it's the sort of thing to do it well, your production quality actually matters. In some cases, some of the things we do in learning and development, the production quality doesn't matter quite as much. And it's more about getting the content out - getting something usable out. Yeah, yeah. But in this case, to pull this off, you needed to do it quite well. How do you then consider in terms of the level of investment, how you ensure that there's longevity in something like this?

#### **Rachel Gillott:**

We took care in building the scenarios in the program, so that they would have longevity themselves. We also chose scenarios that would cross many different practice areas and be very applicable to them. So in terms of the learning messages in the program, they shouldn't change too much over a period of time. However, we do review our programs. We have a review cycle, as many do. And if they do, we will adjust it. We'll be able to pull out a scenario and replace it with one that's more business appropriate to that time.

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This is the induction program. We haven't pulled that forward or the themes forward. Maybe that's an opportunity as we continue to focus in this area, but we do provide additional training on risk management. We've got a series of workshops, again, in partnership with our indemnity insurer, where we leverage their knowledge of the here and now, what is coming out in the industry at the moment, and they will actually also focus a lot about the brain science. What happens in the brain when we make these decisions, when we don't see this information? And how do we actually shift and turn on a different part of the brain so that we can make those conscious decisions? So we implement a workshop about every 12 to 18 months that focuses on the here and now focus areas. Right now I'm working on our next iteration of that to look at an emerging risk area.

#### Michelle Ockers:

It's so interesting the way you've taken this, and over a period of it sounds like about three years since you launched, you continue to add components or evolve components to keep it fresh, to keep it relevant. And so that you don't end up back in that situation where people think, "Well, I've done this," and they're back on that autopilot, "and it won't happen to me."

#### Rachel Gillott:

Yes, it's definitely not a topic you can do, tick, and move on and forget about. It's something that we want to build a conversation that continues. And that we keep focusing on this, because it's critical to providing a great experience for our clients and providing a great outcome for our clients. And our people get a big kick out of doing those great, great outcomes, providing those great outcomes to our clients. So it's got that dual benefits, which is perfect.

#### Michelle Ockers:

How did you go about evaluating the program, either as a whole or any of the specific elements? What's your approach being there to evaluation and demonstrating value?

#### Rachel Gillott:

We get feedback on everything that we do. When people complete any of our e-learning or any of our face-to-face courses, they can provide us with what did you like? What didn't you like? How would you change it? That level feedback. And then periodically, we will reach out to people for more specific feedback, especially early on in a course. So we'll reach out and get more detail. Talk to some of the people who've done it. What was their experience? Do they still have any questions? Connecting with them six months later, do they still have any questions around that topic?

When we were actually looking at some of the feedback that we'd received, one really stood out to me. Was a senior lawyer who joined Shine and she said that historically, she's done risk management training before. But she said this one was very different because historically, it was a bit of a threat, don't make a mistake or else... But this program said that everyone faces these risks and it's the way that you approach them and the way that you respond to them that really counts. So it was more a, "We're here with you, we're in it with you, let's look at how we can improve our management of risk as a group, as a team." So that difference in approach really hit the mark for that lawyer.

#### Michelle Ockers:

Yeah, and I think if you think about the brain science, again, when we talk about motivation and the idea of this towards motivation and away motivation, so you can be motivated to be running away from something, avoiding something, it's like the threat mode, right?

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**Rachel Gillott:**

Yes.

**Michelle Ockers:**

Where our brains don't function as well in threat mode, because it's all about survival. We're not rational. We're driven by our limbic system, by our emotion, versus the attraction, the moving towards something, creating a better outcome. Moving towards something desirable. We're not in that fight or flight stage. So our brains will function far more effectively and retain things far more effectively and take onboard the lessons and the opportunities, right?

**Rachel Gillott:**

Yes, definitely. And that's why we built this around providing our clients with an exceptional client service and an exceptional outcome, and supporting our people to be able to do that. Wasn't around the negative elements that that lawyer was referring to.

**Michelle Ockers:**

That's really coherent, but you link that back to; this is what the organization is here for, and it's all about client service, and that's part of the motivation to do your job well. So it's a very positive form of motivation, I think, and something for us to be thinking about what kind of messages in our organizations are we sending out around things like risk training, or some of our other mandatory training. I think there's such a great opportunity, which you've seized on here, Rachel, is the stuff that we must do the kind of mandatory training, if you like, or the mandatory learning that people must do. You have to do it and that creates this opportunity, make it great, and you build an interest, coming back to the L&D team or coming back for more learning, in whatever format that it's offered and available to you. It's a real opportunity, rather than a chore, right?

**Rachel Gillott:**

Yeah, definitely. And you build that engagement, you build the excitement or the fun, or you build the aha moments. So, it's days with people, and as you say, they come back for more.

**Michelle Ockers:**

You were able to share a little bit around business impact and how you know that this is actually making a difference back on the job.

**Rachel Gillott:**

Definitely. Well, I think from a risk management perspective, that risk is being spoken about and it's being spoken about in the open and in a positive way. That in itself is a real success. We've also from a practical perspective, we've seen our fact sheets be embraced and we've continued to maintain them and build more for different practice areas in the business. So we've got people, practice leaders, putting their hand up to say, "Could you help me build this for my team?" That's a great success for us.

And the campaign, we've been doing this for three years now and we don't have an end in sight because we know that risk is going to be with us in the future. So it's creating this conversation that we're going to have in years to come.

**Michelle Ockers:**

I like that. It's an ongoing conversation that you're enabling there. It's fantastic. Out of everything that you did, and obviously, there was a lot that went well, what were maybe the top one, two, three things that you think went really well and why?

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#### **Rachel Gillott:**

Well, I think the decision to do an organizational needs analysis, that was pivotal to the beginning of our journey because it enabled us to look wider, and to bring that working group together and achieve something that had more longevity. The makeup of our working group, we were able to cross multiple key practice areas within the business. We had senior people. So their insights and their recommendations brought weight to it. Our external partner, partnering with our indemnity insurer, that gave us some great insights into what as an industry were we facing? And that brain science component to it, that enabled the solution to be much more robust and pointed to where they saw, because they see a lot more than we do.

I think just taking that leap of faith to embrace what could be a bit of a kooky idea, that enabled us to do something that is really memorable around this topic. Yes, it covers the facts and the insights, but it's fun to do it. And if you can inject in that fun element, it's easier for people to recall it and it prompts that discussion around that water cooler.

We were so pleased about minimized risk that we actually entered it into a couple of Design Awards. And we were really pleased to receive a gold from LearnX, and also a highly commended from the Australian Institute of Training and Development Excellence Awards last year. So we're really proud of what we've done with this program.

#### **Michelle Ockers:**

Yeah, absolutely. You should be. Which category was the highly commended in the AITD Awards?

#### **Rachel Gillott:**

We entered it into the best use of technology, with our redesign into that e-learning learning frame.

#### **Michelle Ockers:**

Well, well done. Congratulations.

#### **Rachel Gillott:**

Thank you.

#### **Michelle Ockers:**

And was there anything in terms of challenges that really stood out that you had to work your way through carefully and how did you address them?

#### **Rachel Gillott:**

Well, time, as I said, is something that we need to be aware of. The time that our subject matter experts can give to us, but also the time of our programs. So we needed to do what we could internally to draft, to progress through the storyboard, and to engage really pointed needs with our subject matter experts there. And then we needed to be careful that the end program took the appropriate amount of time and not more, but maintains that level of engagement, because that's the important thing. The learning objectives need to be achieved in the appropriate amount of time.

The it won't happen to me mindset, the capturing people's attention, and making risk real, that was a challenge. And we leveraged our indemnity insurer and their insights to assist us to address that challenge. And we were really pleased with the outcome that we had.

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#### Michelle Ockers:

In terms of, by way of wrap up, Rachel, key takeaways for others who may be listening to this and thinking, "I'd really like to do something fresh with my risk training, compliance training". Whatever it may be. Something that people really have to do and it's important, but it's sometimes difficult to do well, what key tips would you give them?

#### Rachel Gillott:

Well, I just say, just dare to be different. Dare to have fresh ideas and to bring in people so that you can really look at something quite differently. Then, make sure you take your business along the journey because the demonstration of our concept was really important to us being able to get that support from our senior leaders. And so that was critical as well, and have a bit of fun with it. Because a lot of times when you're doing something that's pretty special, you do get that innate inside, you're connected with it and you enjoy building it. Don't be afraid to have a bit of fun.

#### Michelle Ockers:

I like that. There's a really nice balance through all of those three tips. Thank you so much, Rachel, for coming and sharing your story on Learning Uncut. I know many people will take away different things from it, that they'll be able to apply to their own body or work. Thank you very much.

#### Rachel Gillott:

My pleasure. Thank you very much for inviting me, Michelle.

#### Michelle Ockers:

You're welcome. Very welcome. And for anyone who would like to follow up with Rachel or has questions, we'll put a link to her LinkedIn profile, on the show notes, and of course, we share all the episodes on LinkedIn. And it's always nice to see some conversation happening around an episode when we do post. So look out for it on LinkedIn and let us know you know what you've done that might be relevant or what your key takeaways are from the episode. Thanks again, Rachel.

#### Rachel Gillott:

Thanks, Michelle.

# EMERGING STRONGER Masterclass

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## **About Michelle Ockers**

Michelle Ockers works with business and learning leaders to realise the untapped potential of learning in organisations. She is an organisational learning strategist and modern workplace learning practitioner. Michelle works with organisations to develop and implement transformative organisational learning strategy, and to build the capability of their learning team. She delivers keynotes, workshops and webinars for learning and broader professional or workforce groups at both public and in-house events. Michelle also mentors learning professionals at all career stages on career planning and professional development.

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

Michelle can be contacted at [michelle@michelleockers.com](mailto:michelle@michelleockers.com).