

Fearless Thinkers, Season 2 Episode 5
Delivering business impact at scale, with Corey Jacobs

Masami Cookson: Welcome to "Fearless Thinkers: The BTS Podcast". My name is Masami Cookson, and our host is Rick Cheatham, head of marketing at BTS. On today's show, Rick sits down with Corey Jacobs. As a senior director in BTS's Sales and Marketing Center of Expertise, Corey partners with client leaders in software, tech, manufacturing, consumer goods, and financial services to transform their go-to-market strategies and enact lasting behavioral change. Prior to joining BTS, Corey worked for an early-stage Bay Area tech startup and the Lego Group. Hey, Rick, how's it going today?

Rick Cheatham: It's really wonderful. I am... And I know that this will timestamp this, but I am now three weeks away from my daughter's wedding, so a very exciting and chaotic time at my place.

Masami: That's so amazing. Congratulations.

Rick: Thank you, thank you, it's fun stuff.
But yeah, super excited to have Corey on. He brings some really good perspective at what it takes to really engage people at large-scale events. How can you get literally 30,000 people around the globe understanding the strategy and ready to act on it with just a matter of days? So, he really brings some great insight and experience into, especially in times of change, like we're in now, a problem that most of us are trying to solve.

Masami: Cool. Can't wait to hear more.

Rick: Let's go.

Hey, Corey, how have you been?

Corey Jacobs: Rick, good to catch up. It's been a while.

Rick: It's been way too long, my friend. What's been going on in your world?

Corey: I just got back from a week vacation with my kids. Luca's nine months right now, and Blair's almost three. And unlike previous vacations, I feel like I survived this one.

Rick: That's awesome. When ours were that small, we used to say that when we get to go alone, it's a vacation, and when we take them with us, it's a trip. There's a difference.

Corey: Yeah, there is. I get the term "Taking your show on the road" now. I know what that means.

Rick: Yeah? Yeah, 'cause you get to leave nothing behind?

Corey: Yeah, it's just the same in another place. The only difference is the setting.

Rick: Many times, for many people, installing a significant change initiative kinda can turn into a roadshow as one way of doing it. Before we go into the how to install a big change, I'd like to start with the beginning, and that's why people are changing.

Corey: Basically, anything that forces an organization to say, "Wow, we have to mobilize a high percentage of our people quickly," that's a compelling reason or compelling event for a company to explore what we'll talk about today, which is driving change at scale. Just a few examples that we're seeing a lot right now, Rick. The first one that comes to mind is turbulence: economic turbulence, or downward pressure on an organization or a market or an industry.

For example, in tech right now, there's a lot of pressure on companies, some of our clients, to be more profitable, so we've seen layoffs happen, but another way to look at that could be to say, "Well, what if we just got wildly productive with the people we have? What if we, in a very short period of time, upskill, or build capability, or build alignment, such that our team is able to deliver on what the market is looking for, and potentially without having to lay off as many people?" So downward pressure from the market could be one, another could be a major organizational change.

Now more than ever, companies that are part of major M&A deals or integrating organizations into their team are under pressure to do so quickly. Working at scale, driving this change at scale, driving alignment at scale really quickly is necessary for them. So major org changes would be two, and then three would be a new strategy, a new initiative that affects many people in an organization, where there's a whole set of new behaviors, new capabilities, new ways of working, and a company wants to do that quickly.

And so, these things have always been there. It's not like downward market pressure, or M&A, or new strategies are new things, but what is new is that, in today's environment, we are able to do these things faster than ever.

Rick:

Corey, I think you used the word "significant", and you used the word "major", and I'm assuming that those are probably in the eye of the beholder.

Corey:

If a company has 50 employees, then scale for them is 50 people, maybe it's 25 people. If a company has 70,000 people, then scale for them might be 25,000, 30,000, 45,000, 70,000 people.

Rick:

It's interesting, when companies have these types of compelling events you just described, it seems like there's one of two big directions to go, and I'm sure there are probably others. One being cascade over time, leaders in the organization take it down to the next level, take it to the next level, and taking change initiatives at scale. Can you kind of compare and contrast the two of those?

Corey:

Rick, I think there's been a paradigm in our space as change, and learning, and development professionals, for so long that change is something that has to start at the top of an organization and methodically filter its way through until it gets to every individual contributor. That's proven effective, and many times, it is the right or the only way to cascade a change. The shift that we're seeing now is that some organizations are willing to move more quickly with more people to deliver a bigger impact, faster.

Rick:

It actually makes a whole lot of sense to me, because when I think about basic human behavior, I think we all have a tendency to, where there are questions, we fill in the blanks with the worst-case scenario. If nothing else, just trying to protect ourselves and those we care about. I can see how a cascade could leave too much time open for people to fill in the blanks, and I can also see where the traditional cascade approach can be watered down, because it's only gonna be as good as the leader who delivers.

If I'm getting you right, scaling the initiative at once, at multiple levels, really helps to kind of eliminate some of those challenges that we've historically seen in cascades.

Corey:

With a traditional cascaded approach to change, there's an abundance of risk by moving so methodically or so slowly, or through the telephone game of translating strategy from leaders down to everybody else, messages get muddled, messages become irrelevant, because something has taken so long that it's no longer the change that's necessary for an organization to be successful. So that's a major shift, right?

But if you flip the risk now and start thinking about working at scale, yes, of course there's a risk of moving quickly. If you don't bring people along the right way, you don't have the right alignment, that can create a pretty big issue. But if you do have those things, then you actually get to realize the value of that change.

Rick:

Makes a lot of sense, and it reminds me of something that we've seen many times before. To launch an initiative like this to a high percentage of the population, you have to get alignment from leaders first. So I would think that, in developing the experience, you would uncover a lot of those misalignments and address them for the experience versus having them manifest in the real world.

Corey:

Typically, what we'll find when we start working with leadership teams is that they've got a pretty wide variety of opinions on what the change needs to be, how the change should get executed, who should be executing the change, why they even need to do it, and how to communicate it. The best leadership

teams are the ones who are willing to listen to each other and invite thought partners into that process to help facilitate the decision-making and drive the alignment that's necessary for those critical moments where their entire organization is experiencing or understanding the change.

Rick: When you see organizations leading these types of initiatives well, what are the important things to consider beyond alignment?

Corey: So, one of the success factors that we push clients to think about is how many different perspectives they can bring in so that when they start thinking about execution, they have some new ways of looking at it. **The famous Einstein quote around insanity is [doing the same thing over and over and expecting different results].** That applies here. If you're expecting to deliver change in a truly different way, then you'd need some new people to inspire your leadership team and your project teams who are delivering the change.

Rick: It's one of those things that I've seen routinely. It's actually unfair to expect people to do radically more different without a new way to do things, because if they were capable, they would be doing it already.

Corey: Well, so that actually is a perfect segue, Rick, into another success factor. If you have a leadership team who's bringing in fresh perspectives, then the next success factor is to go into this change with eyes wide open.

I've recently worked with a software client who does this extremely well. They recognize when an initiative is particularly challenging or demanding because of its scale, and they adjust their execution strategy accordingly. What this could look like is investing in larger teams, invest in data management. And when companies do that, it drives trust when messaging and when experiences hit the masses.

Rick: What you've seen great folks do in these situations is respecting the complexity.

Corey:

[On the software client project, we've] got a great project team, and we've got a set of principles. One of them is about simplicity. When you're trying to get 30,000 go-to-market people through a new sales methodology learning experience in 24 hours, complexity finds you. There is no need to inject additional complexity into the design of an experience or into the execution of the experience, because the complexity lives there already. And that's what really great organizations do, is they recognize where there's complexity.

Rick:

Corey, could you give us a couple of examples of what this looks like in real life?

Corey:

So, one of the places we're seeing this happen the most right now is with go-to-market teams. They'll use events like their annual sales kickoff to deliver a new strategy or a new customer segmentation model or a new methodology to their entire go-to-market team in the matter of hours, right? This is where we're seeing a lot of change happen rapidly at scale.

We've also seen examples where clients are shifting their culture, which is a top-to-bottom, company-wide initiative, and that's a very different way of executing change, right? It's not something that happens over the course of hours. It's something that maybe has elements of a cascaded strategy, but what we'll do is we'll work with these clients to think about, how can you deliver a message as quickly as possible with as few layers as possible so that you can get people aligned around whatever new tools and processes and mindset shifts are part of that culture chain?

We've also seen a focus on building leadership skills and capabilities at certain levels in an organization, especially amongst aspiring or first-time leaders, or mid-level leaders, where we'll see our clients invest in quite large numbers of people and delivered learning journeys that can happen in a matter of two to three months.

So, those are three examples of maybe a event-based approach, a cascaded approach that's happening with very few layers, and then a journey-based approach for specific populations.

Rick:

Even if it's, quote, "event-based", it's not that everybody's in some giant windowless conference room in Vegas necessarily. Some people could be in Vegas, some people could be in Barcelona, some people could be in Singapore. You can go around the world in an event style and still get the same benefits without necessarily co-locating everyone.

Corey:

The last few years, I think, have forced many of us to rethink how we deliver a change at scale. Just thinking back a few weeks now, we just had a client deliver a new initiative in 24 hours to tens of thousands of people, and half of those people were part of 30 virtual cohorts of 500 to 700 people each, and working in teams of five. The other half of those people were close enough to go into the office and have a hybrid or live-facilitated version of that same experience.

And what this client in BTS did was create a consistent, globally-relevant approach to messaging this change, creating an experience around it, driving engagement with it. I don't think we would've even explored that variety of delivery modalities five years ago. I think we would've assumed that it's not possible, the juice was not worth the squeeze. And what we're finding is that, as we get better at working virtually, there's so much opportunity to work in any setting at any time to deliver change at scale.

Rick:

Very cool. It's very on-topic, actually, to think about how compelling events can drive things that were not even thought to be possible. All right, so, Corey, we've given our listeners a lot to think about today, but one of the things that's always very top-of-mind is, "If I heard this, what can I go do? How can I take the right steps towards either understanding more deeply how to drive things at scale, or even talking to others in my organization on this topic?"

Corey:

Rick, I would say that the first thing is to recognize if the change, or the strategy, or initiative, or threat that is bouncing around in your head is something that is powerful and relevant enough. The types of initiatives and the types of changes that we've discussed here are inherently mission critical.

Step two, going back to the success factors, can you find some fresh perspectives to help direct and influence the way you navigate that change with other leaders? And can you drive to the second success factor, the alignment that you need with the leadership team to get the buy-in to start thinking about executing something at scale and executing it quickly.

From there, it's about execution, it's about finding partners. Obviously, we'd love for BTS to be a partner in this kind of initiative, but whoever it is, you have to make sure that you've got the processes, the people, and the execution plan in place to bring it to life.

Rick:

It's great advice.

And as always, my friend, great chatting with you. So thanks for joining us today.

Corey:

Thanks, Rick. Always good to catch up, and thanks for having me.

Masami :

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