Where's the Happy Place?
How to pay for what you want

I just heard a great trainer speak. Jerry Crystal, who has been teaching teachers how to use technology for years said, **"The biggest problem with teaching technology is the trainer.**

Every time you grab a mouse, you have failed. You have lost sight of the goal. **The goal is NOT to finish the task. The goal is to get the learner to be able to finish the task.** *You already know how to do that.*"

One of the reasons companies tend to overlook the simple and turn toward the comfortable, but ineffective is that **they don't take the time before building interventions to consider specifically where they want to go**. I call this process **defining the happy place**. It is very tempting to begin to build solutions before really considering the happy place. It feels good. You know you are doing something because you are busy, focused and have something to show for your work. However, this is getting what you pay for in spades. **If you don't take the time to know where you want to go, how will you know when you get there?**

Finding the happy place involves periods of what I like to call lateral drift, where you are taking ideas generated and letting them percolate in the

back of your head. Groups must give themselves and their members time to come to new and shared understandings. Remember Weick's concept of Sensemaking? He points to the importance of contentious meetings that come to some resolution, because during these discussions, what is actually happening is the group is creating a group sense. **These shared understandings are essential in moving forward in a coherent direction.** That is what can happen when you take the time to define the happy place before rushing in with a solution. (Take the time and slowly chew through Weick's Sensemaking in Organizations.)

Here's an example:

I've mentioned the group from the Navy who were concerned with maintenance of an aircraft. They brought me in because the knowledge portal they had built was not being used. I suggested that I g**o on site and talk with potential users to discover their needs**. What I discovered was that the users had no need for or interest in web based access to documents and manuals. However, there was a **real and pressing need for communications tools that helped people locate others who had specific knowledge and information**. Moreover, the informal knowledge networks (What do you do when you get stuck? I pull out my rolodex and call a friend.) that were in place that handled most of these 'Who do I talk to about...' problems were very tenuou**s** because many of the key players were retiring.

When I reported back to the administrative group, they had **trouble**

understanding how I was framing the problem…odd looks and long silences. I continued to **highlight the difference between user needs and administrative direction**.

Suddenly, the CIO got it. Very excited, he said, **"You mean we only need to provide the information they ask for?"** I replied, "That's it. Connections and the information they ask for." He was amazed, "We have been looking at every document, every process with the question how can this be web enabled and why is this not on the web? You are saying **we can do a lot less and accomplish a lot more."** I smiled. "Exactly."

Immediately, the conversation started to center around how to implement this new approach to support and communication. **A group understanding had been reached. The group made sense of this new information.**

The difference in the administrative group was a **change in how they viewed the happy place.** Their initial goal was building an object…a thing…a portal, **not a state of performance**. Their project goal was to have documents easily accessible via the web. However, **that wasn't their real goal.**

What they really wanted was a more

effective, efficient workforce that did their job better with fewer returns to the depot and less cost.

They weren't looking at that, they were **looking at the thing they thought would get them there.** When they changed from looking at the object and instead looked a the happy place, they were able to see a **new path that got them where they ACTUALLY wanted to be.**

If you are going on a vacation and want to rent a car, it's a good thing to decide where you are going and use that information to decide what kind of car you want to rent when you arrive. Saying that you are going to a great place and so you need a car with lots of storage and a powerful engine is not going to help you if the unstated destination is an island in the Bahamas. **We are drawn to building solutions.** They are nice and concrete. They have a new car smell. You can point to them and say, "Look how hard I have worked." Sitting in a room, looking at maps and having difficult discussions when people have different destinations in mind is not nearly as amusing. So, we tend to back away.

Don't.

Here is the process I go through with clients when we are trying to get to the happy place.

- ☐ Identify **the "actors".** What groups are involved, either directly (using or developing or funding).
- ☐ Identify **the stated goals of each group.**
- ☐ Through observation and conversation (interviews), identify **needs of each group**.
- ☐ Try to identify **unstated goals of each group** (often pretty tricky..take some time).
- ☐ Identify **places where goals** (both stated and unstated) of different groups **are contradictory**.
- ☐ Identify **needs that are in conflict with goals** (stated and unstated).
- ☐ Identify **needs that are not met by goals.**
- ☐ Now you are ready to **decide what the goals should be…what is the happy place.**

This can take several weeks. If you can find Ken Eason'sbook Information Technology and Organisational Change, get it. He traces in detail this process and the importance of it. Often when I do this, **I can feel the clients' impatience**. "What a waste of time… is he just padding his account?" is the unspoken thought. However, I urge you to **do this and to value it**.

More than any other area of endeavor, **spending time at the beginning to think about**

and discuss and decide
where you want to go
will pay off in time savings and increased innovation and performance.

This is a top tool for success. Use it!

This more than anything else will show you how to get where you would like to be, know when you get there, or **figure out what is going wrong when it's not working**.

How many times have you seen big, beautiful systems **that aren't used**? The usual reason for this is that **they do not meet the needs of the folks for whom they are built.**

When you know where you want to be, you are able to explore innovative approaches and ideas that crop up along the way and decide if they are getting you to your happy place.

> **If you don't know where you want to go, you are almost certain to fail.**
> **If you take the time to decide, you are almost certain to succeed,**
> **because even if you have the wrong answer, you know the question and you can try another solution.**

Bart Kaufman is a client and mentor. A very successful financial advisor, he was once telling me how he viewed his work. "I listen to the client and I provide a solution to his problems."

Shortly after, I showed him the online performance system that I had been working on and began to tell him how it could meet his needs. He got angry. "We were just talking. You **just** heard about my problem. Then you pulled out a solution you had prepared beforehand. You weren't paying any attention to me and my problem. **You are trying to fit me into a solution you already had developed.** I got it.

Simple, profound knowledge. **We must build a solution based on problems, not build solutions and try to uncover a problem for which it can be used.** The only way we can do that is to take the time to understand what the problem is and what it will look like when we can say the problem is solved.

It's about finding the Happy Place.