Changing the Mindset of a Data-Driven Organization

Using Dialogue Education and Active Listening

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Being informed is crucial in online education management. Not knowing enough about what separates you from other companies offering similar, if not identical, services can have dire consequences. It can mean the difference between year-over-year program growth and missing projections. Hence, it is my organization's duty, as an online provider of recruitment services, marketing efforts, course development, and student support to several of the nation's premier universities, to not only be abreast of trends as they relate to higher education as a whole but to also be cognizant of data relating to our productivity.

The unfortunate problem faced by recruitment and retention leaders specifically is that the idea of data driving performance evaluations is often times met with resistance by staff. A disconnect manifests between the picture the numbers paint and the feelings of the individual advisor. This is where the ideas of Carl Rogers, Jane Vella, and others come into play. This paper will examine whether my organization treats data correctly, and if incorporating learning dialogue into the training curriculum will allow the use of data as a performance tool to become a softer experience for everyone involved. I will present the issues alongside correlating data and specific examples that will explore how improving dialogue education and active listening can lead to employee growth, improved communication, and energized relationships, ultimately benefitting the student.

Before moving forward, let's take a deeper look at an issue and how the data is used.

In graduate recruitment and retention, every interaction matters, and the area that is most heavily scrutinized is the consultative interview that takes place following a request for program information. During this process, prospects are asked probing, open-ended questions in order to assess the individual's fears, goals, motivators, determination, etc. This establishes a relationship between students and their advisor while giving the advisor the information needed to guide the student through the completion of their graduate degree. And make no mistake – the relationship between advisor and student is a crucial one. As Kim and Sin (2006) noted after researching students of color in library and information science programs, 56 percent of students identified the relationships they'd developed with faculty and staff as a primary motivator for staying in school (p. 87). It really is all about building the relationship through active listening, which Kubota, Mishima, and Nagata (2004) demonstrated is largely considered to be a beneficial skill in the professional world. There is that much value in active listening in online recruitment and retention.

The data points the consultative interview impact are the percentage of students who begin the application, the amount of qualified applicants who go before the acceptance committee, the corresponding accepted-to-start rate, and retention percentages by term. These are hard numbers that inform trainers and managers on the strengths and weaknesses of the advisors we have working on our various programs. What the data tells us when it comes to recruitment and retention in particular is that the opportunities for improvement begin and end with the consultative interview.

For example, the number of times an advisor actually speaks with a student (contact effort) after acceptance is a common metric used as cause for a student failing to start class after indicating their intent to begin a graduate program. The expectation is that there is at least one meaningful conversation each week prior to and after the start of each term. Extenuating circumstances (vacations, work commitments, life events, etc.) can prevent this from happening, of course, but a reasonable effort is expected from each advisor. The thought process is that we cannot expect a student to stay involved in the process without speaking to them. These are professionals with families and other responsibilities that keep them quite busy. If we aren't informing them of the next steps on a consistent basis, the likelihood that they will register for classes, complete financial aid, effectively understand how to use the various learning management systems, and feel comfortable in the way they are going to interact with the rest of their cohort and faculty, is minimal at best. Worse yet, if they do start but aren't prepared, the chances that they will find success and stay in the program decreases considerably, negatively impacting retention percentages. And since we are an education provider, having students graduate is our primary concern.

To illustrate the importance of contact effort, consider: In 2014, 79.6 percent of the 128 students who enrolled in one of the three start dates for a nationally ranked public administration program my company represents were contacted once per week prior to the start of their selected term. Of those students, 95 percent began class, earned satisfactory grades (C or better) in their first semester, and maintained at least part-time enrollment in each successive term. Of the remaining 20.4 percent where the contact effort was not up to company expectations, less than 10 percent found equal academic success and stayed enrolled in at least four units.

In other words, there is a direct relationship between effective communication and student performance. Through phone observations, it is clear that advisors who do the best job conducting consultative interviews and incorporating active listening skills consistently lead our organization in contact effort, start rate, and retention. Advisors that struggle with active listening, as demonstrated through phone observations, have difficulty in these areas.

When presented with this direct correlation, under-performing advisors invariably offer multiple excuses as to why there wasn't a sufficient amount of interaction with their student.

Most common is that it is far too difficult to maintain engagement with a student they cannot meet face-to-face. Therefore, the data point is out of their control. They made the calls. The student didn't answer. Advisors typically can't see where they are at fault or how they can improve. They dispute that the data informs us the problem lies in the interview.

Of course, the initial exposure to, and training of, consultative interview techniques begins during their onboarding. This is where an improvement in our learning needs and resource assessment comes into play. Currently, our training program takes place in a traditional environment where new hires sit through two weeks of classroom exercises, shadowing opportunities with trainers. They are exposed to predetermined aspects of the interview process and perform various role play exercises. In essence, we teach each group the same way even though each training class is comprised of advisors with different strengths, weaknesses, and skill levels. This indicates that we largely ignore the concept that a learning needs and resource assessment can inform the training team, allowing us to tailor the direction of the conversation. And as Vella (2002) argues, we "need to discover what they already know and what they think they need or want to know" (p. 6) to ensure engagement and learning.

Not conducting a learning needs and resource assessment also throws off the learning sequence in some groups. We end up asking new hires to perform consultative interviews at a high level following two weeks of training even though they may come from an environment that didn't stress the concept. We see this manifest when topics need to be covered an inordinate amount of times during the second week of training. And when the sequence is perverted, the reinforcement does not have the desired impact. They are still trying to grasp the topic, not practice it. As Vella (2002) would term it, they are "confused" (p. 13). In simple terms, the fact that trainees struggle with the consultative interviews isn't their fault. We don't have a training system that fits their needs.

If, however, my organization were to conduct a learning needs and resource assessment using an introductory phone call or targeted email survey to new hires prior to their start date, we can use the information to inform each unit's direction. We can be sure to spend ample time on topics that are not only of interest and need to the new hires, but will have the greatest impact from a learning perspective. The added benefit of reaching out prior to the employees' start date is that by taking their needs into consideration, we are on the path toward establishing a sound relationship and are respecting them as decision makers. They are agents in their own development, not merely passengers in a car with no known direction.

The manner in which praxis, or action with reflection, is incorporated into the current design of the initial training cycle is also lacking. Currently, there are knowledge checks that take place several times a day and a final "exam", where each new hire demonstrates that they are aware of how to use open-ended questions to gather as much information as possible about a potential candidate. This is done through mock conversations with members of the training staff, with feedback given in the form of individual conversations. It is not the most effective way of reaching each new hire. A similar praxis framework is used during coaching sessions after the employee is out of training, in that the reflection is done independently. A change is certainly in order.

First, after conducting my research, there is a case to be made that the use of praxis in training and coaching sessions should move from a one-on-one model to one that is centered on the group. This sentiment is largely based on the effect groups have in a learning environment.

To start, Edmondson (1999) determined that working in groups increases safety, promotes the sharing of ideas, and positively influences learning. Further, Bradford and Gibb (1953) noted that “when the leader set(s) up an informal atmosphere in the discussion group, the group [is] more productive of ideas than when the leader set up a more formal atmosphere” (p. 237). Bradford and Gibb also point out “that continued task-orientation, to the point of neglect of interpersonal perceptions and resultant feelings, thwarts task-accomplishment and problem solution” (p. 238). This idea is reflected by Vella (2002) when she writes, “The basic assumption is that all learners come with both experience and personal perceptions of the world based on that experience and all deserve respect as subject of a learning dialogue” (p. 27).

All told, what we currently do in our organization is, in reality, counterproductive to learning. We isolate the individual, creating an environment wherein they feel judged and unable to use their past experiences to the full extent in the learning process. We do not live in inquiry and investigation. This is not intentional, of course. As Vella (2002) notes, “We teach the way we have been taught” (p. 181). By moving from a one-on-one method to a small-group model where each member shares perceptions and gives feedback, it’s been demonstrated that there will be an increase in learning, retention, and buy-in. Consider the story Vella (2002) shares regarding the three-day workshop she conducted for the Maryknoll Graduate School of Theology. Prior to the dialogue learning exercise, there was considerable fear and doubt about the eventual outcomes. After participating in small groups and putting the ideas of dialogue education to work, each participant had a newfound understanding that learning and discovery aren’t necessarily the result of a traditional professor-to-student process. They demand inclusion. A group experience will be the subject of a sample learning exercise at the end of the paper.

Another area my company seems to struggle in is negative capability. In all of the training sessions I've either observed or participated in, I've displayed or noticed a tendency to chime in with a suggestion based on judgment. This is what Gibb (1991) would describe as "solution" response, or living in the answer. We do not take the time to fully analyze the problem; the feedback is instant and final. To be clear, the need for the training is based on inquiry and exploration (based on the numbers, of course), but the manner in which suggestions are interjected during a coaching session is often times based on what is happening at that exact moment. The feedback is not given in the form of identifying observed behaviors and letting the learner examine those behaviors. The rapidness of the judgment informs me that negative capability is not being practiced. As Vella (2002) says, "Without the ability not to intrude but to wait, the teacher cannot be a catalyst" for substantive learning (p. 93). We can see the impact of negative capability in the story of the Indonesian doctor, Margie Annan. In this illustration, Vella allows Dr. Ahnan to be the principle in her own discovery. The teacher is merely a resource to be called upon when needed. I don't allow myself to be a resource for my mentees. Likewise, I don't observe other trainers allowing their employees the opportunity to make mistakes, provide effective feedback to one another after an exercise, or think critically about the benefits of consultative interviews. Again, we are living in the solution rather than inviting the employee to explore the problem. We jump on every chance we get to impart our preferred behavior, which greatly diminishes the resulting takeaway.

Now, in order to do all this, my organization has to become better at active listening. After all, negative capability is only effective if the teacher is observing verbal and non-verbal cues, paying as much attention to what is not being said as what is. More specifically, though, there is a deficiency in empathy within my organization, and upon my honest appraisal, the lack of active empathic listening is largely due to the reliance on data. We make judgments based on the picture the numbers paint, driving a wedge between staff and those responsible for improving performance. Frankly, the situation can be tense at times, with virtually no communication taking place. This puts the trainer and employee at different ends of the accountability spectrum, causing them to blame each other for the situation. It is a natural result of leadership not listening with the intent of understanding. As Rogers and Roethlisberger (1991) note, “the stronger the feelings, the less likely it is that there will be a mutual element in communication. There will be just two ideas, two feelings, or two judgments missing each other in psychological space” (p. 106). And as has already been noted, active listening is largely considered to be naturally beneficial.

Unfortunately, my organization is disingenuous in its message. Whereas we ask the employees to be active listeners during the interview process, we are not willing to be active listeners during the coaching phase, and since we are essentially “selling” a vision of how things could be, it would be wise to consider some studies done on the impact of active empathetic listening (AEL) in a sales environment.

For example, Aggarwal, Castleberry, Ridnour, and Shepherd (2005) write that “for salespeople to be motivated to improve their skills, they need to be convinced that these are important skills for success” (p. 24). This demands that they are comfortable and willing to explore the issue with us. Shouldn’t we then be modeling active empathetic listening, putting ourselves in their shoes for a moment in order to fully understand from where they are coming? According to Comer and Drollinger (1999), the answer is, absolutely:

> Managers can encourage the use of AEL among their salespeople by their own attitudes and behaviors… As coaches, they need to understand how AEL contributes to the selling process so they can train their salespeople to improve their listening. As role models, the quality of their own listening should be exemplary. Managers who use AEL in their interactions with their salespeople set the stage for the use of AEL by salespeople. Salespeople who have had good experience with AEL by their managers will be likely to be more amendable to using AEL in [their] own interpersonal relations with their customers. (pp. 26-27)

This bears repeating: We have to be the model. This also takes Vella's principle of accountability into consideration. We have a responsibility to teach what we say we are going to teach. This demands we are active empathetic listeners to staff members. In addition to demonstrating the value of the skill, two things happen.

First, we gain a reference point as the coaching phase moves forward. If, for example, we find out that an employee has a fear of being candid with students that have missed a deadline or feel the student has chosen a program that does not align with their stated needs, then we can offer ways of moving the conversation forward that are not confrontational, but rather communicates that the student may want to rethink their position. In essence, being active empathetic listeners gives us the chance to have a tangible impact as trainers. If we are not listening actively, then the feedback we give is based on an incomplete picture. The framework isn't in place because the relationship isn't a sound one. This makes learning difficult for most learners. Active listening helps mitigate these problems.

The second benefit to leadership being more engaged through active listening is that there are things that the employee brings to the larger conversation during a training session that will never be known if they are treated merely as a commodity. We become co-learners. Just as Vella (2002) described in her dealings with Dr. Ahnan, dialogue education and active listening allows the teacher to learn as much as the student in some circumstances. It is a beautiful side effect to taking the time to understand and include the other person. There is much that is already being said. We're already told by employees that as a training staff and as a leadership team we value the data to a fault. The perception is that we use numbers to point out a weakness and offer solutions based on our experience. This is the antithesis of what thought leaders like Vella and others espouse. It represents a failure in building sound relationships, holding ourselves accountable, respecting the learners as decision makers, and effectively using praxis, among other things. It also has a negative impact on morale.

Frankly, this all comes back to Paulo Freire. As an organization, we need to rethink the nature of the relationship between the teacher and the learner. According to Freire in Shor and Freire (1987),

> The object to be known in one place links the two cognitive subjects, leading them to reflect together on the object. Dialogue is the sealing together of the teacher and the students in the joint act of knowing and re-knowing the object of study. Then, instead of transferring the knowledge *statically*, as a *fixed* possession of the teacher, dialogue demands a dynamic approximation towards the object. (p. 14)

In creating this “dynamic approximation” through dialogue, there are discoveries made by both the teacher and the learner. It will allow us to incorporate the employee’s perceptions into our process, moving each closer to impacting our students in a positive manner.

In summation, the principles of dialogue education and active empathetic listening needs to be at the heart of my organization’s training design. They are critical components to improving the consultative interview process. That process is crucial in my organization’s ultimate ability to create the type of environment where students are able to share their concerns, and get the answers they need rather than feel unable to count on the person on the other end of the phone. Going much deeper, practicing active empathetic listening, seeking out feedback and incorporating dialogue education into the training design will allow the leadership and training teams to build better relationships and establish trust with staff, improving morale and making data more palatable in the process, ultimately helping the student find success in their program. This will take time. As Stengel, Dixon, and Allen (2003) demonstrated, however, listening is at the heart of an organizational shift in identity. It will be worth the effort.

Group Learning Activity

Who?

New-hire enrollment advisors

Why?

New hires are responsible for conducting consultative interviews with prospective students. The consultative interview is used to determine the proper graduate degree and concentration based on the student's directly- and indirectly-stated needs. The information gathered during the consultative interview is also used for retention purposes, allowing enrollment advisors to effectively address fears and concerns as the student progresses in the program. The current learning activity features a praxis exercise that is delivered individually. The new learning activity will be completed in groups to promote the exchange of ideas and takeaways.

When?

Four times during the first and second weeks of their initial training window. This allows for multiple reflections in a variety of group settings.

Where?

In a training room for the first two observation/reflection cycles and at a trainer's desk for the second two observation/reflection cycles.

What?

Group reflections on consultative interview observations.

What for?

By the end of the fourth observation/reflection cycle, new hires will be able to name five benefits gained by doing a consultative interview, that are arrived at as a group; identify a set of open-ended questions commonly used in a consultative interview; establish a list of best practices to follow when making a program recommendation based on the consultative interview.

How?

To start, a survey will be sent to new hires prior to their orientation date. The objective of the survey will be to gauge, on a general level, how knowledgeable they are with the consultative interview process. There will also be a section that allows for each new hire to pose a specific question about consultative interviews. The replies will inform the facilitator on how specific or broad the initial exposure is; it will also provide new hires with a sense of ownership in their training before it even begins.

First observation/reflection: New hires will listen to a recorded consultative interview from an advisor who did not use open-ended questions or relate their program recommendation back to the student's directly- and indirectly-stated needs, taking notes on what they observe during the course of the conversation. They will then split into groups of two for five minutes, compiling a list of things that stood out. Lastly, the small groups will reassemble into a larger collective to discuss their perceptions with the facilitator.

Second observation/reflection: New hires will listen to a recorded consultative interview from an advisor who used open-ended questions and related their program recommendation back to the student's directly- and indirectly-stated needs, taking notes on what they observe during the course of the conversation. They will then split into different groups of two for five minutes, compiling a list of things that stood out. Lastly, the small groups will reassemble into a larger collective to discuss their perceptions with the facilitator.

Third observation/reflection: New hires will split into separate groups of two and shadow a trainer while they conduct a consultative interview, taking notes on what they observe during the course of the conversation. Following their shadow time, they will spend five minutes compiling a list of things that stood out. The small groups will then reassemble to discuss their perceptions with the rest of the training class and the facilitator.

Fourth observation/reflection: New hires will split into separate groups of two and shadow a trainer while they conduct a follow-up call with an accepted student, taking notes on what they observe during the course of the conversation. Following their shadow time, they will spend five minutes compiling a list of things that stood out about how the trainer used the information gathered in a previous conversation to assist the student in their start-date preparation. The small groups will then reassemble to discuss their perceptions with the rest of the training class and the facilitator.

Following the fourth observation/reflection, the new hires will finalize the reflection process as a large group, coming up with a list of five benefits, a set of open-ended questions, and a list of best practices to follow when making a program recommendation based on the consultative interview. They will also be asked to come up with suggestions for how facilitators could improve the observation/reflection cycles, or if they would have done anything differently. The new hires will then be asked to create their own document summarizing their takeaways to post at their desks for future reference. They will share their creations with the group prior to final certification.

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