



MAKING KNOWLEDGE ACTIONABLE

THREE KEY TRANSLATION MOMENTS

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Abstract: Leaders regularly experience pressure to move innovation and change initiatives through their organizations. They face the challenge of transforming organizational changes and innovations from ideas into sustained behavior. In this commentary, I argue that successful implementation requires leaders to engage in a translation process that contains three key translation “moments”. The challenges presented by these translation moments are magnified by the difficulty leaders often have in shifting from one moment to the next. Techniques for handling each translation moment are discussed.

Keywords: Organization design, actionable knowledge, strategic thinking, organizational change, innovation

The process of implementing new initiatives, including organizational design and change, is inherently an active translation process. Leaders do not simply apply design knowledge and make it actionable; they transform that knowledge via a translation process to make the knowledge useful for their situation. In the process of making knowledge actionable, the knowledge itself is transformed. In this commentary, I describe the characteristics of these translation “moments”, and I introduce three specific translation moments which must be addressed if knowledge is to not only become actionable but also lead to sustainable organizational behaviors. The process used at Ascension Health to adjust to the complex and changing healthcare environment illustrates the value of considering these translation moments during a design process.

A translation framework poses a challenge to the conventional divide between idea generation and idea execution that is pervasive in theories of organization and management. A translation framework suggests you cannot separate knowledge generation from knowledge application (Czarniawska & Joerges, 1996). For knowledge to become accepted as actionable, it must be linked to the receiver’s conception of what is relevant and useful.

The act of translation changes the idea. While this may seem obvious, many approaches to product and organization design, strategic planning, and innovation ignore the translation process or downplay its significance. The act of generating the idea is given priority. Making the idea actionable is simply viewed as a question of execution. However, the act of execution transforms the idea. Translation suggests that it is absurd to consider an initiative a good initiative without considering the context within which it will be executed. Requirements for execution become part of the idea creation process.

I describe three translation moments that leaders need to navigate as they work to make insights, ideas, and knowledge actionable within their organizations. These translation moments have different characteristics and require different skill sets, but what they all have in common is they involve translating a general idea into context-specific action. The first translation moment is the merging of an idea with one or more local institutional logics. The end result of this translation will either be a shifting of one existing mindset to another existing mindset or the creation of an entirely new mindset. The second translation moment is the conversion of organizationally specific knowledge into sustained behavioral change.

The key transformation in this moment is between ideas and routines. The third translation moment is the application of an innovation, such as a new organization design, in a different context. The new context may be an adjacent context (e.g., applying a process change in a different department or region), or it may be an entirely new one (e.g., applying a process change in a structurally separate organization or country).

Making knowledge actionable and sustainable requires a design planning team to help the organization navigate all three translation moments. Most conceptual frameworks and facilitation techniques focus on only one of the translation moments, but fortunately there are separate techniques for handling each translation moment. A skilled practitioner is able to shift from technique to technique as the translation process unfolds. Key features of each of the translation moments are shown in Table 1.

Table 1. Features of Key Translation Moments

	First Moment: Creating a New Mindset	Second Moment: Transforming Ideas into Sustained Action	Third Moment: Shifting Contexts
Characteristics	Eureka moment Paradoxical thinking Post-moment clarity	Extended commitment of time and resources Conversations with stakeholders Flexible implementation	Current state assessment Unique perspective seeking Potential pain-point identification
Barriers to Overcome	Overconfidence Limited frames of reference Fear of failure Binary traps	Entrenched routines Lack of entrainment Conflicting interests	Confirmation bias Insular culture Idea championing
Techniques for Handling	Uncertainty tracking Scenario planning Creativity and innovation techniques	Influence and persuasion Stakeholder mapping Team building Project management	Situational assessment Interest mapping Project pre-mortem Actor pain-points
Main Challenge	Confronting dominant logics	Maintaining momentum over an extended period of time	Resisting overconfidence caused by success of previous implementation

FIRST TRANSLATION MOMENT: CREATING A NEW MINDSET

The first translation moment is one that is familiar to most of us. Many innovation and strategic planning tools are designed to address the first translation moment, the creation of a new or different mindset. This moment is often memorable and exciting to participants as they experience seeing something in a new way. This is the translation that creates Eureka moments or flashes of insight. The Eureka moment generates excitement and a sense of breakthrough. The moment itself often happens quickly, though it may be preceded by a rigorous and structured process. The work at creating this moment comes in making sure the right people are involved, having a process that challenges current mindsets, and devoting time to the critical conversations that need to occur in order to make a breakthrough possible. The shared experience creates a sense of momentum and enthusiasm that can motivate the group towards advocating the organization to adopt the new mindset.

The creation of a new mindset often involves paradox. Paradox is when contradictory yet interrelated elements exist simultaneously and persist over time (Lewis, 2000; Smith & Lewis, 2011). Paradoxical thinking involves holding two seemingly incompatible ideas at the same time and generating insight through their unexpected synthesis. It is through the tension between the ideas that the insight forms. The first translation moment enables a new framing of issues that may also include ways to resolve them.

Barriers to Overcome

In my work facilitating the first translation moment, I've observed several dynamics that can derail the process.

Overconfidence. Overconfidence is a bias that makes the examination of multiple perspectives not only difficult but personally threatening to the participant's self-identity. Overconfidence leads people to believe they know more than they really know, to downplay the possibility of failure, and to reject alternative perspectives as misguided (Lovallo & Kahneman, 1993). It is difficult for leaders to look for new mindsets when they are convinced that their current framing of a situation is correct. This becomes even more difficult if the leader has already invested his or her reputation in the previous choices that led to the current shared perspective (Arkes & Ayton, 1998). The curiosity needed to create a new mindset emerges from recognition that the team does not know everything it needs to know about the situation.

Limited frames of reference. Exposure to different frames is necessary to enable the translation process. Examining multiple frames can help a leader recognize which frames have the most value for the situation. Unfortunately, individuals are not always aware of their frames of reference. All frames have blind spots, and participants in the process need to actively seek out different perspectives if they are to recognize a different path forward (Bazerman & Tenbrunsel, 2011). Without a process for exploring multiple frames and recognizing the blind spots of their current frame, a design team will struggle to find the time or discipline needed to make this translation.

Fear of failure. Stepping outside of conventional mindsets comes with risks. As tempting as it is to say leaders need to be courageous and explore different mindsets, the reality is that such action can potentially put the individual's livelihood at risk. Advocating a new mindset invites public ownership of the idea. If the idea does not work, it will be easy to blame the advocate. When operating out of current mindsets, participants experience less personal risk. They are simply doing what is expected of them.

Binary traps. The binary trap is a well-known dynamic in decision science. It is the tendency to only see two options. For example, a common binary trap is to assume something is an either-or issue. Another binary trap is to view decisions with an "us vs. them" lens. Binary traps tend to reduce decision quality (Nutt, 1993) as well as short-circuit conversations about creative options. If individuals find themselves within the us vs. them dynamic, any attempt to break out of the conventional mindset (the "us" mindset) opens the individuals to the criticism that they are advocating the "them" mindset. This binary trap makes it difficult to even see alternate mindsets in the first place.

Techniques for Handling the First Translation Moment

Techniques that challenge managers to push beyond their existing mindset and confront the uncertainty in their environment can help structure this translation moment. Examining high-impact uncertainties in a structured manner is an excellent first step to break out of an existing mindset. The focus on uncertainties, rather than trends, can push a group to debate the unknown rather than confirm the known. This approach directly challenges overconfidence and opens up questions about data integrity. Scenario planning (Schoemaker, 1995) takes this process further and provides a means of triggering innovative perspectives and strategies. The speculative nature of scenario generation reduces participants' tendency to discount realistic but lower probability future states. Debating alternative scenarios and relevant data can stimulate the development of new locally relevant mindsets. Uncertainty analysis and scenarios can also inform the creation of strategy tables that link mindsets and specific initiatives. If the initiative is customer-based, blue ocean strategy (Kim & Mauborgne, 2004) can play a similar role as scenario planning. Blue ocean strategy forces participants to examine their firm's products and markets from a customer perspective. It can lead to a new mindset about the purpose of the business, value of products, or investment priorities.

Ascension Health's Ministry Positioning process illustrates how the first translation moment can set the tone for the next two translations. Ascension Health has successfully completed the first translation moment, and three things about its process were instrumental in setting the stage for, not just the first translation, but for the second and third ones as well. First, Ascension Health planners started with the assumption of difference between ministries rather than the assumption of similarity. This framed the task as one of designing multiple

solutions to fit the regional contexts rather than designing a single solution that would be adjusted at the edges. Second, Ascension Health has a vision to be a strong, vibrant Catholic health ministry in the United States which will lead the transformation of the healthcare industry. Such a vision is a powerful way to drive leaders to fight through the discomfort of confronting conventional frames. Third, the Ascension Health process started with “outside-in” planning techniques (scenario planning and options generation) which were explicitly linked to an evidence-based understanding of each health ministry. This planning approach helped the organization develop a mindset of creating customized strategies and organizations for heterogeneous regional environments.

SECOND TRANSLATION MOMENT: MOVING FROM IDEAS TO ACTION

The second translation moment is the transformation of new knowledge and ideas into sustained action. The manager experiences the second translation moment in a very different way than the first translation moment. Unlike the quick Eureka-type experience of a mindset shift, the movement of an idea to action requires a long-term commitment. It requires a continual infusion of energy, re-commitment to the work, extended project management, and the balancing of stakeholder interests.

The second translation requires patience, flexibility, and engagement with a wide range of people. An organization’s work routines have developed over a lengthy period of time, and they cannot be changed easily or quickly. New routines need time to be designed, practiced, and institutionalized before this translation is complete (Feldman & Pentland, 2003; Howard-Grenville, 2005). The long-term nature of the second translation makes it problematic in organizations where results are expected immediately. In addition, because this translation occurs over an extended period of time, it is inevitable that the context itself shifts during the implementation process. A significant part of the translation process is matching new ideas with existing stakeholder interests and perspectives. Conversation and communication is the dominant activity during the second translation given its long-term, multi-stakeholder nature.

Barriers to Overcome

The second translation moment can be derailed during the transition period that occurs during a handoff to an implementation team. The energy generated during the first translation does not always carry over to the implementation team. Leaders of the change initiative may sense a loss of momentum because they underestimate the level of work needed to change behaviors. Failure of an initiative during the second translation can often be traced to one of three barriers.

Entrenched routines. The second translation moment is all about changing behavior. This means changing work routines. The more established the routines, the greater the risk the new design will be rejected. Also, previous experience with failed changes can create cynicism about the initiative and contribute to entrenched routines. The hard work of changing routines requires commitment to the idea, goal clarity, and continual supportive engagement with organization members.

Lack of entrainment. Entrainment refers to the alignment of time cycles within an organization (Ancona & Chong, 1996). Within any organization, there are time patterns that repeat themselves (e.g., quarterly financial reporting, annual performance reviews, 3-5 year strategic planning cycles). The second translation moment requires awareness of these entrainment cycles while working to translate the idea to fit the cycles. All too often, long-term design changes fall by the wayside as short-term pressures or misaligned reward systems create headwinds that the initiative is unable to overcome. Understanding the different types of work cycles and managing the tensions between them is a daily challenge for managers (Daugherty et al., 2013), and awareness of these cycles is crucial as leaders work within the second translation moment.

Conflicting interests. Aligning stakeholder interests is at the core of strategic change. The translation work involves finding ways to frame issues so that stakeholders understand the problems the organization is trying to solve. However, it can be the case that certain

stakeholder interests cannot be aligned. Some change frameworks imply that there is always a way around this barrier. In my experience, this is not always the case, and divergent interests simply make this translation moment intractable. Stakeholder planning prior to initiating action can catch this trap before significant resources are committed.

Techniques for Handling the Second Translation Moment

The inability to maintain momentum and focus are common process derailers during the second translation moment. Frameworks for change management and strategic execution offer guidance for how to put new design ideas into practice. Training in influence and persuasion, stakeholder mapping and engagement, team leadership, and project management all provide the types of capabilities that can enable managers to successfully complete this translation. Given the long-term nature of this translation moment, the management of stakeholders, the monitoring of member motivation and enthusiasm, and committed leadership are the driving forces. Tools that can focus managers on these needs are most valuable.

My interviews with change leaders across a range of organizations reveal that lack of appropriate expertise and poorly timed stakeholder engagements are frequent causes of second translation failure. Proactive use of team expertise assessments and stakeholder mapping/engagement tools can ease a team through this translation moment. Early use of the TAP team expertise tool (Task-Ability-Person), when combined with scheduled times to adjust team composition as the process evolves, can be invaluable to ensure that expertise is effectively deployed. Likewise, stakeholder-based change models can be effective when applied early in the process.

The second translation moment has been largely completed at Ascension Health through the work done with the four pilot ministries. Given the long-term nature of the change initiative, leaders in these four ministries will need to continue monitoring progress and adjusting actions, so it would be premature to say the second translation moment has been successfully navigated. Ascension Health's design of this initiative illustrates how to manage this translation moment. A phase to make explicit the investments, partnerships, or reorganizations necessary to develop each health ministry's healthcare delivery model was built into the initial project design. By including this phase prior to setting implementation schedules, Ascension Health avoided the trap of separating the idea generation and the implementation process. In addition, Ascension Health carefully selected the four pilot locations to maximize learning by identifying organizations facing different environments. It is often tempting to select pilot organizations based on convenience (e.g., near corporate offices), enthusiasm (e.g., leaders are on the design team), or perceived likelihood of success. Obviously, learning from such choices would be limited since the pilot organizations would not fully reflect the conditions faced by the other organizations. Ascension Health avoided this trap as well.

THIRD TRANSLATION MOMENT: SHIFTING CONTEXTS

The third translation moment, shifting contexts, comes when it is time to take a successfully implemented initiative and apply it to another part of the organization. The image that often comes to mind amongst managers is that of replicating. The goal is to replicate the success of the initiative in a new location. The image of replicating, however, may be part of the problem since shifting contexts is not a replication but a translation. The design idea that was transformed into action through the first and second translation moments may not be the same idea in a new context. In order for the third translation to be successful, the idea needs to be retranslated into a relevant concept for the new context.

Barriers to Overcome

The third translation can be derailed by the very success of the second translation. An initiative's success in a pilot, or in a limited part of the organization, can lead leaders to expect similar experiences when the initiative is transferred to other contexts. This risk can be amplified if the implementation team selected a pilot context specifically because it

would increase the odds of changes being successful. When shifting and scaling an initiative, leaders must vigilantly monitor the process in order to recognize barriers that are unique to the new context.

Confirmation bias. Research has shown that individuals actively prioritize information that suggests they are correct (Hart et al., 2009). Confirmation bias prompts people to look for evidence that their plan will work and discount evidence that their plan will not work. When it comes to applying new ideas and initiatives in a new context, the confirmation bias research warns us that we will look for the similarities between the contexts and use those as an argument that the idea will work. At the same time, we may discount differences between the contexts. This can lead to an almost automatic application of the idea and subsequent surprise when the idea does not work as well in the new context. Because of this tendency, if the initiative fails in the new context it is tempting to blame the execution. Since the idea worked in the first context, execution is an easy scapegoat.

An insular culture. Good global marketers know that it is a mistake to try to sell a product designed for one market in another market without attempting to understand the characteristics of the customers in the new market (Day, 2010). In much the same way, shifting a design idea to a new part of an organization requires an understanding of the characteristics of that part of the organization. Unfortunately, structural and process changes are often designed within the central corporate culture of an organization and are imposed on the peripheral units, which may view such changes as “externally” conceived. Questioning the initiative or challenging its implementation may be viewed as resistance to change and not taken seriously (Piderit, 2000).

Idea championing. Much as the sudden transformation that occurs during the first translation can lead to unrealistic expectations of the time needed for the second translation, the need for an idea champion to maintain momentum and energy throughout the second translation can become an impediment during the third translation. The success experienced by an idea champion in transforming ideas into action can lead to overconfidence that makes it difficult for the champion to see potential blind spots when the context is shifted. The previous success at overcoming barriers can lead to a misinterpretation of the idea’s fit with the new context. Also, Nutt (2005) found that ideas that were championed by an individual were faster to decision but less likely to be implemented than were initiatives that were decided through a shared bargaining process. When shifting an initiative to a new context, the previous success may limit the use of bargaining as part of the process, and thus the engagement of stakeholders may not be as rigorous. Once again, misalignment may be seen as resistance to change.

Techniques for Handling the Third Translation Moment

Common process derailers of the third translation moment include inappropriate application of learning from the pilot and overconfidence tied to the pilot’s success. Revisiting tools used as part of the earlier translation moments for the given initiative can help leaders focus on how this context is different. These tools may include re-prioritizing uncertainties, revisiting stakeholder maps, and examining needed expertise. The project pre-mortem exercise (Klein, 2007) is another tool that works well to identify the unique needs of the context. In the pre-mortem process, the team assumes the project was a failure and considers what could have caused the failure. The pre-mortem conversation identifies ways the current design plan may not be aligned with the reality of the new context. Finally, applying techniques for customer-centricity and understanding of customer pain-points can be used in a similar way when examining how things will work internally within an organization. The aim of these customer-centric tools is to understand how people actually behave, how their expectations and behaviors are different from others, and what it would take to motivate them to engage with the initiative.

The third translation moment is underway at Ascension Health. The company’s focus on starting with measurable data and benchmarks for each new context places the implementation teams in a good position to succeed as the initiative is rolled out across all 26 regional healthcare organizations. The main risks Ascension Health must now be aware of

are (a) succumbing to the temptation to replicate actions taken at a previous ministry rather than following the roadmap of data collection and verification of current state and needs; (b) relying too heavily on the experience of the champions of the pilot program such that new implementation teams grow overconfident or learn the wrong lessons from the pilots; and (c) accepting the outcomes of the initial scenario and option exercises as set in stone rather than reviewing them and asking how the world has changed since the scenarios were created.

IMPLICATIONS

Throughout this commentary, I have noted the actions managers can take to enable successful navigation of the three translation moments. To these I add the broader implication of anticipating the challenges that occur due to the very different characteristics of the three translations. Including key stakeholders from across the organization in an effort to create a new organization-specific mindset, as Ascension Health did, can smooth the transitions and inevitable challenges that will confront leaders during the later translation moments. Academic researchers can also use the translation framework to make the knowledge they create more actionable. Below are three specific recommendations I offer for researchers:

1. *Do research on translation moments.* The question of how managers translate between general and local mindsets is important to answer in order to learn more about how knowledge becomes actionable. The dynamics of these translation moments are not well understood. Identifying patterns is problematic when the focus of attention is on how knowledge becomes contextualized. Many approaches to research privilege general knowledge. This should be expected since the primary goal of much academic research is generalizable insight and frameworks. A good starting point is asking the question of how and why the translation is done in the first place. Acknowledging that this translation takes place is a good first step. Attempts to generalize without recognizing that managers modify frameworks each time they use them can lead to spurious results.

As one of example of this, consider the difference between those who write about organizational change and those who work to implement organizational change. The most successful change practitioners recognize that no existing model completely fits the situation they are working in. The change manager's job is to modify models of change to make them fit the situation. Many academic approaches to change seek to describe and validate a framework of change (Austin & Bartunek, 2003). It is difficult if not impossible to develop strong empirical evidence that a change framework works in practice because the change framework itself will be subtly, or not so subtly, modified each time it is implemented. Thus, we are left with empirical studies of change that are essentially a series of case studies. Perhaps a more valuable area of scholarly inquiry would seek to understand how practitioners translate the models rather than testing the models themselves.

2. *Emphasize holistic solutions.* Each of the three translation moments can be successfully navigated using well-developed and proven facilitation techniques. Unfortunately, each of these techniques comes from a different area of management education. The first translation moment is addressed using outside-in strategy tools, innovation frameworks, decision-making approaches, and critical thinking. The second translation moment is addressed using the tools of organizational change, negotiation and persuasion, and large-scale project management. The third translation moment is addressed using the tools of situational awareness, customer-centricity, and external issue framing. Leadership development programs that are designed to bring together capabilities from the fields of strategy, organizational development and change, negotiation and decision making, and marketing strategy can effectively encourage managers to recognize the need for a wide range of skills in the design/redesign process. Efforts to bring these skills together into coherent leadership training could potentially alleviate some of the challenges managers experience when shifting from one translation moment to the next.

3. *Understand your own mindset.* Researchers, just like managers, operate from a dominant mindset. The work of the first translation moment is to break out of an existing mindset in order to create a new mindset. Researchers are trained to look at problems from different angles, but few ever carefully examine their own basic mindset. Doing so could help identify

blind spots, challenge assumptions, or understand a prevailing managerial mindset in a particular organization. Such active reflection could lead to new research directions. Current mindsets can be confronted and questioned in order to generate truly unique insights. Though we teach critical thinking, we sometimes forget that we are prone to the same limiting frames that hinder managerial success.

CONCLUSION

These three translation moments – creating a new mindset, transforming ideas into action, and shifting contexts and scaling an idea – are necessary for innovation and organizational change to become sustainable within an organization. Because the three translation moments are so different in character, completion of one moment does not necessarily make completion of the next moment easier. In fact, it may be the opposite due to risks of overconfidence and momentum loss. The Ascension Health case illustrates the importance of designing a change process in a manner that accounts for all three translation moments. By carefully considering going beyond existing mindsets, selecting the right pilots, and gathering situational data during shifts in context, Ascension Health has designed a process that should help its change leaders effectively traverse these three translation moments.

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