



Why Momentum Matters

Leading Learning Podcast
Transcript for Episode 448

Celisa Steele: [00:00:02] If you want to grow the reach, revenue, and impact of your learning business, you're in the right place. I'm Celisa Steele.

Jeff Cobb: [00:00:10] I'm Jeff Cobb, and this is the Leading Learning Podcast.

Celisa Steele: [00:00:16] Momentum is crucial in learning—not just for individual learners trying to grow their knowledge, skills, and abilities but also for learning businesses trying to grow their reach, revenue, and impact.

Jeff Cobb: [00:00:28] Imagine a learning business that sees the opportunity to launch a new certification. Leadership is excited, the initial planning moves quickly, including an environmental scan of what's already out in the market.

Celisa Steele: [00:00:41] But then the process stalls. Scheduling becomes a nightmare as some key stakeholders wind up neck-deep in developing and delivering the annual conference. Decisions are postponed, and months pass.

Jeff Cobb: [00:00:53] After the annual conference is over, and the team recovers and returns to the new certification opportunity, it's slow going to reengage in the past thinking, and, by the time they get back to where they were months ago, they learn a competitor has launched a similar program—an organization that wasn't doing anything when they did their environmental scan. Now any first-mover advantage is lost.

Celisa Steele: [00:01:17] That's a hypothetical situation, nice and pat, but what we hope it does is illustrate the point that momentum is important. For those of you who don't remember a lot of your physics (me included before prepping for this episode), momentum is the product of a body's mass and velocity.

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Jeff Cobb: [00:01:38] What we're talking about today is strategic momentum, which we're defining as the product of an initiative's strategic weight and its execution speed.

Celisa Steele: [00:01:48] Strategic weight represents the importance and clarity of an initiative—how well defined it is, how well aligned it is, and how valuable it is to the organization. A vague or misaligned initiative has little weight, and it's not going to be capable of generating meaningful momentum.

Jeff Cobb: [00:02:09] Execution speed is how quickly and consistently actions are taken to implement the initiative. A well-defined, important initiative without movement stalls, and a fast but less important or unfocused effort lacks staying power.

Celisa Steele: [00:02:25] That's our definition of strategic momentum—it's defined by an initiative's weight and execution speed. What we want to talk about today is why momentum matters, some common barriers to maintaining momentum, and then some strategies for maintaining momentum.

Jeff Cobb: [00:02:45] Let's look first at that question of why momentum matters in learning businesses.

Celisa Steele: [00:02:52] The simplest answer is that momentum drives results. The faster a learning business acts on a strategic initiative, the sooner it's going to see the results of that initiative, the sooner it's going to see an improvement in its reach, revenue, and/or impact.

Jeff Cobb: [00:03:07] Definitely. You've got to get going if you want to get somewhere. Momentum ensures you get going and stay going, and you do it at good speed. Now the next point might be avoiding what we would characterize as "snapshot obsolescence." If strategic planning is slow, then the data and insights that you're using to drive that planning, to drive what you're going to do strategically, those grow stale.

Celisa Steele: [00:03:34] In our hypothetical example that we kicked off with, that was the case there.

Jeff Cobb: [00:03:38] That's exactly what happened, yes.

Celisa Steele: [00:03:39] Another reason that momentum matters is that it helps you achieve financial and operational efficiency when projects stall. That ties up some of your resources,

even if it's just the people involved and the people's time that's involved. It can create uncertainty because it's like, "Okay, we were supposed to be done with this by this date. Now we're not. What am I supposed to be doing? Where does this fall in the overall scheme of priorities?"

Jeff Cobb: [00:04:05] And then another one—and I think we've probably all felt this if we've been involved in big strategic initiatives that did get momentum and got us someplace—is it boosts confidence and morale so that sustained momentum keeps the team engaged, whereas, on the other hand, stops and starts create frustration—which we've probably all experienced as well.

Celisa Steele: [00:04:28] I have experienced both the increased morale and the confidence that comes from something rolling along well and also, yes, the deep frustration that can come from something that stalls. The last "why momentum matters" that we'll touch on here has to do with your place in the marketplace. If you have momentum, that's going to help you remain relevant, remain competitive.

Jeff Cobb: [00:04:54] Those are some reasons why momentum matters. I'm sure you can probably come up with some additional reasons of your own as you're listening or add some detail to the reasons that we're talking about here. But it definitely does matter. It really does help to drive a business forward, drive a learning business forward. We can talk next about barriers to momentum. There are a number of factors to look at there as well. Before we dive into some of those, you referenced physics earlier, Celisa. One of the sole laws of physics that I remember is Newton's first law—a body in motion tends to stay in motion, and a body at rest tends to stay at rest, and it'll stay at rest unless there is a force applied against it that sets it into motion. For momentum to happen, there has to be a decision in the first place to do something. You're saying, as an organization, "We're going to look at our strategy. We're going to make some plans here to move forward." Once you do that, that's going to start the motion. But then there are other barriers, the friction that can arise to make that body in motion not stay in motion.

Celisa Steele: [00:06:05] Let's walk through a few barriers that come to mind when we think about what can slow a strategic initiative down. One is around decision-making and the bottlenecks that can happen there. There can be different factors that lead to that decision-making bottleneck. It might be that there are a lot of stakeholders, and it's really hard to corral them all. It could be that there are slow approvals, which might tie to a lot of stakeholders being involved and needing to take time to get everyone to say yes and to weigh in and all of that. It

could also be because of a lack of clear leadership, a lack of clear ownership—who really is responsible for this and driving this forward?

Jeff Cobb: [00:06:48] Yes, this happens a lot in our world because there's often a need for consensus or at least a perceived need for consensus that has to be navigated and negotiated. There may be situations where perhaps you don't need consensus, or you need a lighter level of consensus, and you have to give some single person or a smaller group of people the accountability and the responsibility for moving things forward. Now, another thing we see a lot, a second barrier is perfectionism and over-analysis, that urge to want every detail perfect before taking action, or—we see this all the time—organizations just want more data. "Can we get more information? Can we get deeper and better insight into what we're trying to do?" And we're fans of data. Certainly, we do a lot of helping organizations collect data, but there is a limit. At some point, you've got to say, "We've got enough here to make a reasonable decision to move forward."

Celisa Steele: [00:07:40] Depending on what your strategic initiative involves, this may be a place where pilots or minimum viable products or things like that may come into play because that's going to allow you to take some action. And then you were talking about data, Jeff, but it's also going to give you some very specific data to whatever you're trying to achieve that's going to then allow you to refine what you're doing and move forward.

Jeff Cobb: [00:08:01] Yes, you want to get that body in motion and then do what you can to keep it in motion.

Celisa Steele: [00:08:07] Another barrier to momentum can be competing priorities. This often takes the form of people have their urgent daily tasks. They're things that have to be done because that symposium is taking place next week, and this has to be done, and therefore some of the strategic work is going to take more of a back seat because, while it's important, and everyone talks about how important it is, it doesn't feel as urgent because it perhaps doesn't have that very clear timeline associated with it.

Jeff Cobb: [00:08:36] Yes, there's that classic division between the urgent and the important and weighing those against each other. If I'm remembering correctly, if you put those out into a four-square matrix, that's an Eisenhower Matrix or an Eisenhower Box. I believe it's Dwight D. who is behind that; it's how he liked to look at the activities that he engaged in as a general or a president. The things that were both urgent and important got the most attention. But some things were urgent and not that important. Some things were important but not that urgent.

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And this is all part of, as you said, looking at those competing priorities and having a way to manage them.

Celisa Steele: [00:09:13] Another barrier to momentum is lack of accountability. This may be deemed important, each individual may even see the importance, but, if it's not clear what I need to do to contribute to this initiative, then that can be a barrier to momentum. Making sure that there are follow-through mechanisms, that those are clear, that people understand what's being asked of them, that's going to help you keep momentum. And, if you don't have those, that's going to be a major barrier to momentum.

Jeff Cobb: [00:09:42] Yes, there needs to be a name associated with the actions you're taking, a person who is accountable. I've seen organizations can get a little uncomfortable with this idea, but it's so important. We're doing some work ourselves with the Entrepreneurial Operating System (EOS), and one of the things I like that they stress is you clearly chart out accountability within an organization. This would be accountability within a strategic initiative. And there's just one name that goes with each of the items that falls into that accountability chart, so that there's clarity around who's ultimately responsible, who's actually going to answer for what's happening.

Celisa Steele: [00:10:20] The last barrier to momentum that we'll touch on today is scheduling challenges. I feel like this one comes up a lot.

Jeff Cobb: [00:10:30] It certainly does in our work.

Celisa Steele: [00:10:31] Often the strategic work that organizations are engaging in does require multiple key stakeholders to be involved, but getting all those stakeholders in the same room, whether that's a physical room or even a virtual room, can be very difficult. Take as an example a learning business. They want to redesign one of their flagship programs, but, when you're looking at the leadership of the learning business, you're looking at subject matter experts (SMEs) who need to be involved, you're looking at the marketing team, it's very easy for meetings to get pushed out by weeks because you're trying to make everyone's schedule work, and that can then delay execution of getting that flagship program redesigned and out there and bringing in more revenue and creating greater impact for your learners.

Jeff Cobb: [00:11:19] That's one we definitely see variations on time and again in our work. It's something that we work on getting better at helping our clients manage and make sure that

they are.... You can probably never completely eliminate that as a barrier to momentum, but you can certainly alleviate it, ameliorate it—to use another one of those fancy A words.

Celisa Steele: [00:11:40] That's the handful of barriers that we wanted to touch on: decision-making bottlenecks, perfectionism and over-analysis, competing priorities, lack of clear accountability, and scheduling challenges. Those are the typical barriers that we have in mind when you're trying to think about how to maintain momentum. Now let's turn to what can we do. Given those are some of the barriers, what are some of the things we can do to help keep a strategic initiative rolling along, to help it maintain momentum?

Jeff Cobb: [00:12:12] Once we've got that body in motion, how do we keep it in motion? In my mind, this first one relates back very strongly to the last point we raised about scheduling, though it applies broadly across the whole idea of momentum. That's simply communicating the need for momentum, making sure that everybody who is involved in a strategic initiative understands and appreciates why momentum is important.

Celisa Steele: [00:12:39] And so it's going back to some of those things we opened up with, the idea that, if momentum is what drives results, if you decided to go down the path of this strategic initiative, the faster you complete it, the sooner you're going to see those results, the sooner your learners are going to see those results and those benefits. That's one of the things that you might stress as you're communicating this need for momentum. And, as part of that, stressing to each individual, "You play a role in creating and maintaining momentum, so, if you shrug off your part or don't do your part when we're asking, that's going to slow the whole process down," making it clear that this really is meant to be teamwork, and each person has something to do, but, by doing their part, they're contributing to what the organization overall can achieve and can do.

Jeff Cobb: [00:13:29] This ties back to accountability. Individuals are accountable or need to be held accountable for their role in the initiative and for maintaining momentum in the initiative. That's the first thing, kind of ground floor—make sure you're communicating that need for momentum. The next one would be to set and to commit to—again there's an accountability aspect in there—realistic timelines. You want to establish a firm but, to a certain extent, flexible timeline upfront and then once again hold people accountable to that.

Celisa Steele: [00:14:03] Buried in what you were saying there, Jeff, is there may be some shifting as you get into the work around some of the subtasks that are associated with whatever work you're doing. But, overall, you're committing to a clear timeline of "We're going to have this

ready for the board meeting in November” or whatever it is that’s driving it. That’s very clear, and that’s what you’re making sure that everyone is aware of, and then you’re holding everyone accountable to. And, if there is some slippage, then there’s discussion around, “Okay, how do we tighten up some of the next tasks so that we can recover some of the time and stay where we need to be in terms of wrapping up this initiative overall?”

Jeff Cobb: [00:14:39] One of the reasons for there being some flexibility in the timeline is any strategic initiative is a learning initiative. As you go along, you’re going to get more information as a result of the actions that you take, and you’re almost certainly going to have to adjust at times. But being clear, calling those out, making sure people are aware of them and that they are used as learning experiences, as you may at the same time be adjusting the timeline as a result, that’s very important.

Celisa Steele: [00:15:10] The third idea we have around how to maintain momentum is around tackling those scheduling challenges head-on. There are a few tactical ideas that we can suggest here. One is to lock in key meetings as early as possible and have those scheduled, and then communicate the dates and times, but then also communicate the expectation that people will protect those dates and times. If you know you have those key meetings set with all the key stakeholders, that’s going to be hugely important and hugely helpful in staying on track.

Jeff Cobb: [00:15:46] Yes, definitely. We’ve gotten to the point—anybody who’s worked with us from a consulting standpoint knows—that we’ll start looking at the scheduling sometimes even before a contract is signed, just to make sure that we’re getting things in place and are going to be able to establish and maintain the momentum that we’re talking about here. Another approach to tackling scheduling challenges head-on is using a “rolling quorum” approach. If everybody can’t be present, a core group is empowered to move forward, so you don’t have to get everybody there for every decision. You have that ability to keep the momentum going.

Celisa Steele: [00:16:20] For example, you might have as part of your key stakeholders subject matter experts; maybe you’re leveraging a group of four of them. There are some times when two of them can weigh in and can represent that subject matter expert point of view. Another idea is to make sure that you are leveraging asynchronous opportunities to keep progress going, so that you don’t necessarily have to have more scheduled synchronous meetings than are needed. One rule of thumb is that, if a meeting is a status update, then you might be able to do that asynchronously by sharing documents, recording a short video to update people, maybe different project management tools. But, again, if you’re clear about the expectation (“We’re going to be providing status updates; we expect you to review them.”), then some of that can

happen asynchronously within a specified amount of time. “At some point during this week, you’re going to review this document or this set of deliverables around what we’re working on,” but that can fit in, slot in to each individual’s schedule where they need it to.

Jeff Cobb: [00:17:31] In some ways, it seems like an obvious one, but we see it slip again and again, where the meetings do fall into things like status updates that don’t necessarily require the time they’re taking up to do it. Of course, something that happens then is that people start to zone out of those meetings. They don’t view the meetings as important as they could be and should be, and it damages momentum. It damages the culture around an initiative. This is a culture thing. You’re establishing shared values around how we’re going to manage our project work, and everybody has to buy into that and be committed to doing their status updates in the project management system, if that’s how you’re handling status updates.

Celisa Steele: [00:18:14] A fourth idea for maintaining momentum is around accountability structures. Make sure that you’re building those and then communicating them. We’ve already touched on this at a couple of points in our discussion today, but this is around having clear owners for tasks, especially for decisions, but then the actions that need to come out of those decisions as well.

Jeff Cobb: [00:18:38] I feel like we might have to retitle this “Momentum and Accountability” because accountability obviously comes up a lot and is so important in creating and maintaining accountability. And, within those accountability structures, another thing is to use check-ins, dashboards, project management tools to track progress, as we were just talking about, but those have to be considered part of that accountability structure.

Celisa Steele: [00:19:00] Yes, because accountability is making sure that the people who are supposed to be doing things are doing them. But then there’s also the communication piece around it. That’s where a project management tool can help you, if you’re the one doing it, share that information with others, and, if you’re not the one doing it, to see that progress is being made. Another approach that you can take is to time-box the decision process. What you want to do is set some hard deadlines. You know that this decision has to be made by this date, and you’re going to stick to that, whether everyone weighs in or not. That’s drawing that line in the sand and saying, “If you want to have input on this decision, it has to come by this date because we’re going to choose how we’re moving forward at that point.” I think back to your point around culture too, Jeff. Part of what you can do here is almost create the sense of “Okay, we’re all right with default decision-making,” meaning, if no one objects by a certain date,

you've provided all the information, they know how to weigh in if they want to weigh in, but, if no one does by that date that you've put out there, then the decision is to move forward.

Jeff Cobb: [00:20:05] We've talked about communicating the need for momentum, setting and committing to realistic timelines, tackling scheduling changes head-on, building those accountability structures. A fifth one would be maintaining strategic visibility. We see this happen all the time that strategic work is going on, but, after that initial meeting where everybody's told about it or that sort of thing, it goes under the radar screen after that. You need to keep key initiatives top of mind through your internal communications and regular updates about it so people, if they're not directly involved at a particular point in the process, are still aware that it is going on and that that momentum is there, that it's moving forward.

Celisa Steele: [00:20:47] Another tip that we'll suggest is around trying to build in urgency but building in urgency with an acknowledgment that burnout is a possibility. You want to set meaningful milestones, and, when you reach those milestones, you want to celebrate those wins because that's going to help people feel like, yes, progress is being made. Whatever extra time and energy they're putting in is being valued, and it's helping us move forward. So you want to have that urgency, and you want to celebrate those milestones that are going to help keep that momentum going.

Jeff Cobb: [00:21:20] The last one we'll mention here is leverage external support. This may sound a little self-serving, but this includes things like bringing in consultants or facilitators that can help create that structure, urgency, and accountability. There is a reason that there is a thriving industry of consultants and facilitators out there because this is a large part of what those types of external experts can help with when it comes to strategic initiatives and momentum.

Celisa Steele: [00:21:52] Those are seven ways to try to help you keep a strategic initiative rolling, to help maintain that momentum. I feel like we should double-down on this idea of priorities and say another word or two about helping your internal stakeholders and your external stakeholders prioritize this work. That can be hard, especially if the folks that you're involving in the strategic initiative have competing responsibilities and other priorities. And, let's be honest, that's very often the chance. Very rarely is someone solely focused on whatever strategic initiative is at hand. Almost everyone is always going to have some level of competing responsibilities and other tasks that they need to get done.

Jeff Cobb: [00:22:39] Let's talk about some concrete ways that we can help those internal and external stakeholders. I'll say upfront that, for me, these are characteristics or behaviors of good leadership in general within a strategic initiative or otherwise. The first one is to tie the initiative to their success and mission, to the success and mission of those internal and external stakeholders. Show them why this matters for their career, for their team, for the learners that they serve.

Celisa Steele: [00:23:10] That's right. If you're working on a certification program, you can say, "When we finish this, you're going to be directly helping thousands of professionals advance their careers." Helping people see that this very detailed work they may be doing around wordsmithing learning objectives, ultimately this has the potential to change how people work out in the field and in the industry that they serve.

Jeff Cobb: [00:23:32] A second one is do what you can to reduce their cognitive load. Break work into bite-sized, manageable tasks rather than overwhelming people with big tasks or a big dump of tasks onto them.

Celisa Steele: [00:23:47] We know, as learning business professionals, that cognitive load is a real issue. It's something we have to help our learners with. When we're engaging in strategic initiatives, we also need to help the stakeholders involved in that work, have it be manageable, help them with that cognitive load. We can use templates. We can bring a draft of content for a group to review rather than trying to groupthink it in the moment. We can use summaries, perhaps AI-generated summaries, from meetings to help people keep up with what were the major takeaways from that last meeting and refresh them as they're going into the next meeting, for example.

Jeff Cobb: [00:24:23] This is a great potential place to use AI. We've seen organizations starting to do this, for example, with their subject matter experts in generating content for courses. Ultimately you want your human subject matter experts driving the content, but, with so many fields these days, to do some initial drafts of objectives and some initial drafts of content for those subject matter experts to then be able to respond to and shape and work with—from my own experience, being given a draft of something, even if I then do, and I usually do, put substantial work into reshaping and crafting that draft into something of my own. It helps so much to have that to start with.

Celisa Steele: [00:25:00] Another approach can be to incentivize engagement. If you're working with outside subject matter experts, often those are volunteers. But this is a space where you

could look at is there an honorarium that you can offer for their participation? If there's not, if it doesn't make sense to have a monetary incentive, maybe some form of recognition—making sure that the folks involved in this are getting touted in your communications internally and externally.

Jeff Cobb: [00:25:30] I'm a big fan of that. I don't think it happens enough. Annual meetings and things like that, that's the perfect place to stand those subject matter experts up in front of everybody and say, "These people really helped us to deliver meaningful content, learning experiences" (whatever it is) "out to our audience. We wouldn't be the same organization without them." I don't see that happen enough.

Celisa Steele: [00:25:50] And then, if we're thinking about internal stakeholders, one opportunity is to tie their participation in the strategic initiative to their performance goals. Make this part of their annual review, their quarterly review. Have some bullet point in there that is about their contribution to this strategic initiative.

Jeff Cobb: [00:26:11] And then a fourth one is leveraging peer influence. It helps a lot if you've got a respected leader or a well-known subject matter expert involved and engaged. Cultivating that person can help make it much more likely that others are going to want to be engaged and will prioritize it when they see this respected individual giving their time and effort to it.

Celisa Steele: [00:26:33] Again, this gets back to part of what you can do. If you do have that respected leader, you do have that well-known subject matter expert involved, make sure that you're sharing that publicly, that you're recognizing their contributions. That's going to help them keep that momentum. People are going to want to be part of that because it's going to have that sense of weight and importance and vitality to it.

Jeff Cobb: [00:26:53] We've looked at why momentum matters, barriers, ways to keep it rolling, and ways to help internal and external stakeholders prioritize. We're going to offer a recap and some reflection questions, so stick with us for a couple more minutes.

Celisa Steele: [00:27:15] At leadinglearning.com/episode448, you'll find show notes, a transcript, and options for subscribing to the podcast.

Jeff Cobb: [00:27:23] If you enjoy the Leading Learning Podcast, please do us and a colleague the favor of sharing this show with one other person who you feel would appreciate and get value from it.

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Celisa Steele: [00:27:32] To recap, we're defining strategic momentum in a learning business as the sustained forward movement toward key goals related to reach, revenue, and impact.

Jeff Cobb: [00:27:44] Strategic momentum is enabled by timely decision-making, consistent execution, and an environment that minimizes delays and friction. It matters because learning businesses thrive when they move with purpose and efficiency.

Celisa Steele: [00:27:59] To help you understand momentum in your learning business, consider these questions. Where and when does your organization tend to stall? What can you do differently to minimize friction and keep making progress? The answers will likely point to how you can make the initiative more important and more urgent for those involved.

Jeff Cobb: [00:28:19] Where and why have you had success in maintaining momentum on a strategic initiative? Analyze that success, looking for ideas you might be able to apply to situations that are more likely to stall.

Celisa Steele: [00:28:31] Thanks again, and see you next time on the Leading Learning Podcast.

[music for this episode by Moarn]