

# THE SYSTEMIC BEHAVIOR CHANGE PLAYBOOK

Inspired by insights from Eileen Macdonald Cooke on The Adoption Curve.

## Introduction

Most organizations don't struggle with teaching employees *what* to do.

They struggle with helping employees consistently *do it differently*.

This playbook helps Learning & Development, Enablement, and Talent leaders move from:

✗ Event-based training

➡ to

✓ Systematic behavior change programs embedded into business operations.

The framework in this guide is designed for organizations implementing:

- New technology
- New workflows
- Sales transformations
- Process improvements
- Digital adoption initiatives
- Large-scale operational change

The goal is not participation. The goal is measurable business behavior change.

## How to Use This Playbook

### Apply It to a Real Initiative

- Technology rollout
- Process change
- Sales transformation
- Adoption initiative

### Follow the 5 Steps

1. Identify the gap
2. Define behaviors
3. Reinforce consistently
4. Embed into workflows
5. Measure impact

## STEP 1: Identify the Business Gap

**Objective:** Uncover the business problem leadership is trying to solve.

### Ask:

- Where is performance lagging?
- Which KPIs are underperforming?
- What behavior needs to change?
- What happens if nothing changes?

### Business Gap Snapshot

Business Goal	Current Gap	Desired Outcome

## STEP 2: Define Required Behaviors

**Objective:** Translate business goals into observable employee behaviors.

### Example

Goal	Required Behavior
Increase CRM adoption	Reps log customer activity daily
Improve onboarding	New hires complete simulations before live work

### Behavior Mapping

#### Employees Must START Doing

- 
- 

#### Employees Must STOP Doing

- 
- 

#### Managers Must Reinforce

- 
-

## STEP 3: Reinforce Consistently

### Objective

Design reinforcement beyond one-time training.

### Behavior change requires:

- Practice
- Feedback
- Repetition
- Manager reinforcement
- Workflow support

### Reinforcement Plan

Learning Moment	Reinforcement Method
Initial onboarding	Guided simulation
First live execution	Manager coaching
Common workflow issue	Embedded walkthrough
Ongoing adoption	Reminders + refreshers

### Reinforcement Channels

- Slack/Teams
- CRM prompts
- Team meetings
- In-app guidance
- Job aids
- Micro-videos

## STEP 4: Embed Support into Workflows

### Objective

Deliver learning in the flow of work.

Employees need support:

- During execution
- At moments of friction
- Inside existing systems
- Without disrupting productivity

### Workflow Support Planner

Workflow	Where people get stuck	Embedded Support

### Support Options

- Interactive walkthroughs
- AI simulations
- Tooltips
- Checklists
- Searchable FAQs
- Chat assistants

## STEP 5: Measure Business Impact

### Objective

Measure behavior change — not just participation.

### Avoid Measuring Only

- ✗ Attendance
- ✗ Completion rates
- ✗ Satisfaction scores

### Start Measuring

- ✓ Adoption rates
- ✓ Workflow accuracy
- ✓ Time to competency
- ✓ Performance improvements
- ✓ Reduction in errors

## Adoption Dashboard

Metric	Baseline	Target	Current
Adoption Rate			
Workflow accuracy			
Time to productivity			
Error reduction			

### Leadership Alignment Checklist

Before scaling, confirm:

- Business priority is clearly defined
- Behaviors are measurable
- Managers reinforce the same behaviors
- Support is embedded into workflows
- KPIs connect to enablement efforts
- Reinforcement continues after launch

### Quick Wins

Start with:

- One workflow
- One team
- One measurable behavior

Then pilot, refine, and scale.

### Examples:

- Interactive walkthrough
- AI simulation
- Workflow checklist
- Manager coaching guide
- 60-second micro-video