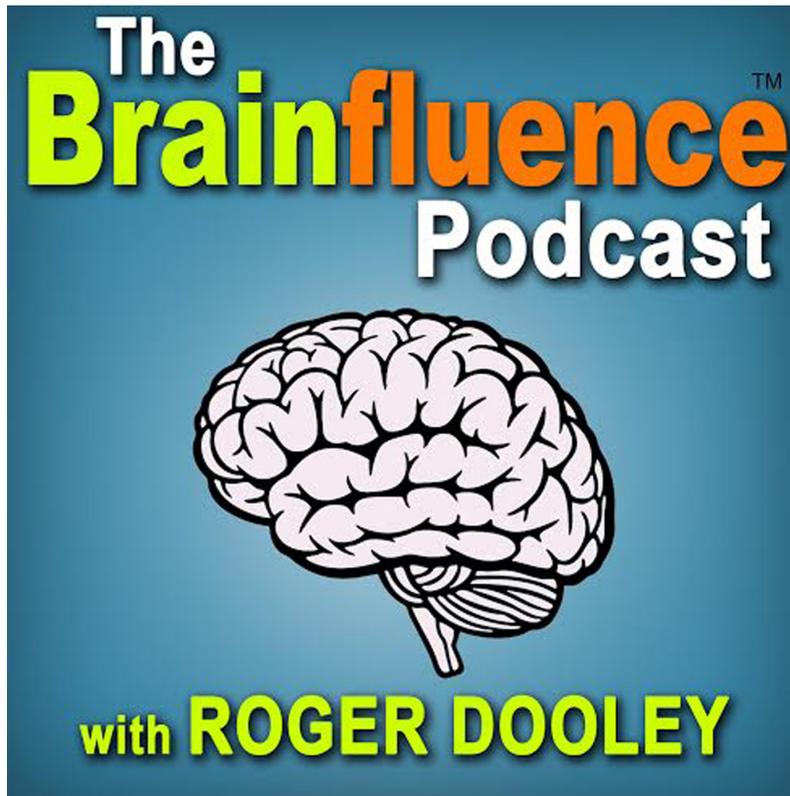


Ep #146: Use Anthropology to Build Your Business
with Andi Simon



Full Episode Transcript

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Roger Dooley

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Welcome to the Brainfluence Podcast with Roger Dooley, author, speaker and educator on neuromarketing and the psychology of persuasion. Every week, we talk with thought leaders that will help you improve your influence with factual evidence and concrete research. Introducing your host, Roger Dooley.

Roger: Welcome to the Brainfluence podcast. I'm Roger Dooley. Our guest this week, Dr. Andi Simon is a corporate anthropologist. I think you'll find her very interesting because even though anthropology seems a lot different than the topics we usually cover here, in fact, it's highly relevant.

Anthropology's another way to do what neuro marketers and behavior researchers do, uncovering aspects of the way people behave that tell us how to best influence them and change their behavior if that's our objective.

Andi is the founder of Simon Associates and Management Consultants and has over 20 years of experience as Senior Executive in the financial and healthcare spaces. She helps companies and non-profits develop their purpose in brand positioning, redesign their culture and various other things. She's been on Good Morning America and been written up in Business Week, Forbes and The Washington Post.

Andi is the author of the new book, *On the Brink: A Fresh Lens to Take Your Business to New Heights*, and now Andi's going to explain how you can apply anthropology to solve some of your problems and create new opportunities. Andi, welcome to the show.

Andi: What a pleasure to be here Roger. Thank you so much. I was particularly interested at the intersections of the neuro-sciences and culture, and so as we were talking about this program, the question was, "Where's the brain and where's behavior and how do they intersect," because what we do is a great deal of

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observational research to better understand how people behave, what the symbols are, what they share and we know people live in tribes or groups ... call them what you like.

They're very herd-oriented and we get much comfort out of sharing things and often they become so sacred that we won't give them up even if they're no longer viable or functional. So, it's a very interesting intersection between the neurosciences and how humans have created this symbolic world we call "culture."

Roger: Okay, so Andi I'm curious how a nice anthropologist like you ended up in the world of business. Shouldn't you be in some remote country studying the encroachment of technology on hunter gatherers or something similar?

Andi: Well you're assuming that the companies that we work with aren't simply like other cultures, hunters and gatherers. Sometimes they're farmers who plant the seeds and water the crops and hope they cultivate it exactly the same way, but when you step out and you look at companies today, while we think they're very complex, they reflect humans who are trying to get something done in a collaborative fashion where they create their symbols, beliefs and rituals. It may not be face painting but it is in fact far away, and as long as you can step out and look at it with fresh eyes, you can find all sorts of opportunities that are sitting inside there that they simply haven't seen because they're the really good hunters and gatherers doing what they've always done. So, I just think it's a bide.

I got into it during the period of deregulation for banking. I was a professor and I had my tenure and I was doing all professorial things. I was introduced to Citibank and they asked if I could help them change, and then I spent 15 years in banking helping organizations adapt, you know. I bought their first computers,

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first ATM's and realized how hard it is to help people actually change, even when it's essential that they do so, so I went from studying it to implementing it and that's what I've been doing, helping companies blend the two since then.

Roger: Mm-hmm (affirmative), well that's great. Believe it or not Andi, you are not the first corporate anthropologist we've had on this show. Way back in Episode Number 17, that's just about two years ago, we had Christian Madsbjerg from ReD Associates and I'm sure many of our listeners were not subscribing then, so we'll assume many folks are starting from scratch on corporate anthropology.

One thing that really surprised me in the book was that Intel has an internal anthropology group and then occasionally uses external consultants for anthropology as well. That really surprised me you know. A chip maker would not have been my first guess as to an obvious user of anthropology you know, compared to say a consumer brand company where you're more obviously dealing with humans. Why would Intel need an anthropology group?

Andi: Well two things ... By the way, ReD is a wonderful organization and they've done some marvelous research. Intel, Microsoft, Ericsson, lots of companies realize they have to observe what people are actually doing with technology if they're going to really design what their chips are going to be able to do also, and Intel's anthropologist teamed up with GE to see how home medical devices were actually being used in the home. Once you become appreciative of the fact that you cannot ask people, "What are you doing and how is it feeling ..." you have to observe them, you'll see all sorts of insights coming from external observation.

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Sometimes I think "Undercover Boss" is my best advertising because it visually shows people how you can learn things by hanging out, so it doesn't much matter what kind of company you are. If you step out and look at it with fresh eyes, I often encourage my own clients to do that with us or you can hire anthropologists to, but I think that it's a wonderful illustration about how it's important not to simply ask or do your quantitative research, but really dig inside so you can see what's actually going on.

Roger: Yeah, that's pretty interesting because you would think that Intel would basically be a commodity supplier, obviously very high tech but looking for guidance from their customers you know, whether it's Dell or IBM or somebody like that, or whether it's Microsoft, but they're obviously taking things into their own hands.

You know you said something Andi that I think really struck home and 99% of our audience would agree with, and the reason that they often tune into this podcast is because they believe that you need to do more than ask people questions because people are incapable of telling you what they want in many cases, what they'll do in the future almost always.

We've had some recent spectacular fails in that area with Brexit vote and the Trump election and so on where despite asking thousands and thousands of people what they were going to do, and statistically being perhaps reasonably accurate, it didn't work. Predictions were wrong and of course marketers see that all the time. When they ask people if they're going to buy a product, "Oh I would buy that product," and they introduce the product and nobody buys it.

Andi: Well you know I had a Huffington Post article. I think I called it, "What Hillary Couldn't See That Was in Plain Sight." What we

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were seeing out in the field was the number of Trump signs in the middle of America was quite astounding. There weren't any Hillary signs and our own clients were very disturbed about many of the regulations that had come out of the Obama administration.

It was very interesting listening to them talk about the election, not necessarily in terms of which president but what the current presidency had created, and then if you took a look at the social media stuff, "Hillary, why weren't you tweeting?"

Very often you can believe those polls, but I thought this one was particularly powerful and really not getting at what was happening in the field, and how fresh eyes could have helped her see what we were seeing. So, it's a cool article.

Roger: Yeah, and something else that you could read into from the signs I think is the depth of commitment of Trump voters or Trump preferers pre-election was deeper than Hillary preferers before the election, and I did hear one analyst who had access to a lot of data comment that when they saw, there's always election day switching that occurs ... that people switching their names in between the time when they were surveyed and when they actually voted and they saw much more migration away from Clinton toward Trump than vice versa. That went to the sort of level of intensity of support. Hillary had more supporters but they may not have been quite as committed as those Trump supporters.

Andi: Well there's also the power of habit. When we work with companies what we find is that human beings are habit-driven and they're not even thinking about the habits. They go about their daily lives in a very efficient way, and I often wonder in elections if that's not powerful as well. For people to change requires intentionality and effort. To follow what they've always

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done is very comforting and so culturally they just may have gone about doing what they always did, and even if they intellectually thought otherwise, the habits took over. So, I do think culture and the brain work hard at making things simple and easy and the habits are very powerful to keep you comfortable. I saw a lot of comfort going on there.

Roger: Right, and sort of when you talk about habits making easy then you get into the Common System One System Two thinking where our brains greatly prefer that simple System One thinking than really analytical, and to some degree the two candidates messaging also played into that where Trump was definitely a System One emotional messenger. Hillary was more advancing arguments to System Two, which obviously didn't work out quite as well.

Andi, you say in the book that the first thing to do if you're looking for either opportunities or to try and better understand your customers, what you should do is observe your customers. How do you go about doing that? What are some things you do to observe those customers?

Andi: Well let's be simple and make it easy with a couple of illustrations. The book is called "On the Brink" because all the seven cases in there were "on the brink." Laclede Chain knew, I think the first chapter, is a very good illustration of what you can do, so Jim Reilly went back to his office after we worked with him and he sat on the telephone to listen to the inbound calls coming. Now this sounds ...

Roger: Just to back up, Laclede Chain was a company that, customers have probably not read the book yet, although hopefully they will. They were a lead manufacturer of tire chains right, which has to be one of the least sexy products ever. It's low tech and not only that, it seems the marketplace for that is

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declining because now a lot of cars have all-wheel drive. You've got better tires and so on.

I know as a youth I would see cars with chains driving up and down the street. I grew up in Buffalo so I know all about chains, but you know now you simply never see them, and of course in Austin we don't see them, but so these folks were in a business that they were dominating or they had a very strong position in that business but offered very little room for growth.

Andi: Well, and in their mature state he was stalled, and as we worked with him he did something very simple. He sat on the telephone next to the customer service person who was answering the calls, and what he found was that within two hours he had more calls for what he didn't do than for what he did do.

Now this is, it was sort of fascinating to him because he had an epiphany. He says to Susie, "How come you keep saying 'We don't do that?'" She said, "Because you told me we don't do that." He says, "I know, but why don't we do that?" She says, "I don't know, but all day long I answer calls for what we don't do more than for calls for what we do do."

When you say, "How do we observe our customers," it's not that mysterious to begin to sit and listen. He grew his business 40% by doing the things he didn't do, so that's sort of one of my most delicious stories because he was stalled by staying very onto those things that we're really comfortable with and are our core capabilities and our very old way of thinking about it, and we continue to work with them to keep sustaining that "fresh eyes" on where the inbound is coming. What are people asking for that you could be doing but aren't? That's one simple one.

In another situation we can hire anthropologists to go out and observe, but we always take our clients with us, and so in a

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hospital that we were working with, we took management out to sit down and watch what people were actually doing when they came into the hospital and listened to what they were complaining about before they came, and listening to what the doctors who were referring were talking about and they always, stories are so powerful. Just ask people about their story. Don't ask them to answer a fact because in the story, as you know, we organize their facts into a story and that story then becomes reality.

As you begin to share the stories, we can begin to hear what's going on, so for this hospital we found out that the patients were afraid to come into a foreign place, a place that was in an inner city and it was a safety-net hospital and it was uncomfortable for them. Out of it we created a whole program called "You're never alone," and we hired people to come in and be their guides to make sure that when they came to the hospital they were never alone.

It transformed the whole experience in a very simple way, but the doctors now could give a name to somebody and say, "When you go, here's who your gonna call and your experience is very helped and managed along the whole process," and as it went on we began to find all sorts of opportunities throughout the whole place, whether it was bariatric surgery where people were crying, people were alone. Why does it have to be, in a hospital that's supposed to be caring for you, so it was insights that turned into opportunities. "We often talk about observation into innovation."

My third one is a wonderful college story and Seton College was flat, not growing and we spent a ton of time with them and their team, observing. It wasn't hard to begin to listen to students talk about what the experience was like, and they began to realize that they taught people the way they really

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learned and that was the story. That was their benefit, and we completely repositioned them, branded them, went into the market ... Next thing you know they had an overflow and a wait list and they were growing again.

I often quote John Seely Brown who said "The way forward is all around you," and what we try to do is help them step out and see it themselves because you know from the neurosciences, unless there's seeing going on and feeling going on, the thinking part can't figure out what's going on.

Those are some illustrations and I can certainly go deeper. The book is full of "how to's" and it's designed to make business people amateur anthropologists.

Roger: Mm-hmm (affirmative). That reminds me a little bit of some aspects of it like it reminds me of a Martin Lindstrom who was a guest a few months back where his latest book, *Small Data*, is based on his observations where he actually, he's typically looking for sort of deep consumer insights and getting ahead of the trend as opposed to more pragmatic very specific types of opportunities. He spends 300 days a year traveling and much of his time on the road is spent actually sleeping in customers' homes or potential customers, consumers just to sort of absorb the culture and observe what they're doing.

Sometimes he connects dots just from the areas where something he sees in Saudi Arabia relates to something he saw in Korea and ends up with new insight, so he's sort of performing at an anthropology function there too, little bit different emphasis and perhaps not having that exact same training, but it reminds me a lot of that.

The key in every case though is to actually not assume you know what people want, but to actually see what they're doing and try and determine what their needs really might be.

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Andi: The hard part is people will never tell you where they're challenged or their pain is, but you sit back and watch and you listen to them and all of a sudden ... and that listening part is so different than selling the factory out. It's listening to them and beginning to see unmet needs ... Big area of opportunity. The gentleman you were just talking about is doing exactly what we would encourage people to do is to go hang out. Watch what people are actually doing and see where their frustration is or unmet need.

When we start with a client we often hang out in the lunchroom. You'd be amazed at what your employees are talking about and if you could capture the pain points, how could you turn them into better experiences. Of course, we're inbound marketers and we truly believe that in today's world everything is inbound. People are searching.

You can take a look at key words. It tells you a great deal about what the patterns are and to his dot collecting, we look very carefully at the three, four and five dots and the next things you know, we see patterns, but it's moving fast. The hockey stick of change is making it very hard for people to figure out what to do and our job is to help them not be "deer in the headlights." You know when I named the book, "On the Brink," they were all deer in the headlights and no reason to be. There's stuff happening.

Roger: Do you think the observation phase is getting more difficult these days? I know in the early part of my career I spent some time in field sales and the organizations I was with were fairly typical. We sold to various kinds of businesses, business sales and there were little offices scattered in many cities across the country. We spent a lot of our time physically going into customers' facilities.

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You'd go in to call a purchasing agent or something, but often you'd meet with engineers and there was always the obligatory plant tour because everybody wants to show off their factory and what they're making and how they make it and so on.

Today, that seems to be much less common. Now, unless you are a really enormous customer, you're probably being handled by a telephone sales rep or you're conducting most of your transactions online and you really don't have that interaction to the degree that you did you know 10, 20 years ago or even a little bit longer. Are you seeing that and how do you work around that, if that is a problem?

Andi: It's very interesting because I literally got off a call with a perspective client whose sales people can't seem to get inside those companies. To your point, the buying process has changed. The buyer is now often a millennial, not a boomer and the people who are selling them are more typically Gen-X or boomers. They're 45, 50, 55 or older and the telephone is no longer the vehicle for communicating.

I had three clients this past year, all of whom are having to reinvent the process because where people who have grown up digital, millennials do, is the first thing they do is "search." If you don't come up on Google on that first page, one or two, you don't exist and if your web experience doesn't help convert them from somebody searching for something to somebody considering you, you don't move into that queue of good evaluation consideration.

They're pre-bought before they get ahold of you and want to connect, and I've had client after client whose sales people can't get in the door, or even into doors they used to be in, only to find that the buying process has so transformed that they are not sure what to do now.

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We're working with one client now where the inbound calls are coming through the internet and they've now put all their millennials into a new program and they're the ones who are selling to the people who are inquiring, and they're really beginning to better align those who are in sales with those who are purchasing. It's all backwards from what they were familiar with, so that the world that you knew may still be operating, but it is being transformed and rather quickly.

Roger: Hm. One thing I thought that was interesting, the point you made in the book Andi was that observation of the humans is great, but you can actually use digital tools to observe them too, or observe their behavior at least and draw conclusions from that. Talk about that a little bit because certainly I think a lot of our audience uses web analytics tools and various other kinds of tools. What are some of the things that you can do digitally to make your anthropological judgments?

Andi: I'll do three things. The early days of the internet we used to put cameras up and ask people to do things online, tell us how they were going to do it online and then watch and videotape them actually do it. What we learned is what they said and what they did were so far apart that they really didn't know what they were doing, so that was sort of early days, but it's simple and often people like simple solutions.

The second thing we do is often use a go-to meeting or a Skype and we share screen with somebody, and then we watch from the other side as they are going about doing what they're doing ... And then there are programs like Hotjar which can actually show you where on the website they are going, where the hotspots are and then we're HubSpot partners. We look at all the page performance. We can see when we do something, which pages they go to, how they do it and then we do key

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word analysis constantly because we can see the shifts as they are happening. There's an abundance of data.

My last one is that the data is so wonderfully big and abundant now that there are lots of people being hired to tell stories about what the data means, and what we find we're doing with online digital data is trying to be able to interpret it in the context in which it means things. In Anthro 101, data do not exist ... out of context, what is the real meaning? What we're finding is that we need to now take that data that's accumulated and begin to understand it. We're doing a lot of work in the healthcare domain along those lines because there's an abundance of data. What does it really mean and how do you tell a story about it?

Those are our three different things that we were using. There's lots out there to help you understand it. I think the hardest part is then to change what you are doing to be responsive to it.

Roger: Mm-hmm (affirmative), well actually that brings up something else I wanted to ask about and that is internal change within organizations. We've been talking a lot about customers and understanding their behaviors and their wants and so on, but often the biggest challenge to a business is internally that they need to make major changes, but as we discuss people do not like change. They will resist change and the problem is, people fail to behave like robots, you know, which would be really convenient but instead they don't always do what you want them to do.

When a business sees this need for sort of dramatic internal change and they know that it's going to be affecting people and it will be an emotional thing for some people and just sort of maybe a pain for other folks, how would you start looking at that kind of a problem to approve the change process?

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Andi: That's a great question and I'm giggling a little bit because often we know we have to change. Sales are flat or things are changing and we know we want to become a different kind of an organization. We say the words and then people say, "Yes, you're right," and then go back to what they do.

There are a couple of things that we've found very useful. One of the things is that people don't really know what it meant by what you wanted to change. What does that really mean? How am I going to behave differently? We often start with a storytelling session about, "Tell us a story about how you get things done now," and then once we all agree that's the story then, "How will the story change if we do what we would like it to do."

Knowing how the brain works and tying into the way in which it's going to fight me, we start with them trying to do active learning, visualization and not a vision, a visualization, actually storytelling about what won't we do, what will we do. Then we begin to put a plan in for getting small wins. Think of this as practice.

I mean, I can't give people a golf club and a book and say, "Learn to play golf." You have to hit the ball a lot of times and so now we want to change the way they are doing things intentionally and so we need to give them the practice time and the small wins to change how they are going to go about doing it.

What we value and believe and how we reward that, sometimes we have funerals, things that we never want to see happen again, and then there are other things that are sacred that we don't want to ever see change, which is hard ... But sometimes we're moving from a very collaborative family firm to one that's very competitive and results-oriented and we're going to have

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to figure out how to make some major shifts in the culture and the way we do things

As the small wins begin to manifest themselves, we need to celebrate them and then we need to build upon them and then we have to bring others into it. The transformation process, I often tell people it's a little like theater. You've all been playing Macbeth really well but we're not going to do that anymore. We're going to play Hamlet where we haven't written a script. You haven't had rehearsal time. There's no director putting you on stage, but you're all quite capable of playing new roles in this new performance.

I will tell you that once you put it into a metaphor like that, they realize that they are quite capable of beginning to learn a new script and a new behavior, as long as somebody applauds every time they master it even a little bit, but people who are leading the transformation aren't, cannot be directors. They need to be enablers because this is one of the hardest problems for humans is how do I become more competitive when I'm a collaborative individual who works with a team but we don't get things done?

I had one wonderful client on the west coast and we did, we have a tool we use called the Organizational Culture and Assessment Instrument, the OCAI. We're affiliated with a group in the Netherlands and it's a wonderful, wonderful instrument and he had one area in one of his offices that was wonderfully collaborative but had no results and the other one that was so competitive, they had lots of results but no collaboration. The question was, "How are we going to change these to get better balance around the middle?"

Then I've worked with entrepreneurs who can't get anything done. They have ideas a minute and then bureaucratic

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organizations that have no ideas, and so the model allows us to begin to articulate and visualize what we would like to see change and then begin to move them forward.

It is never, this is a journey. The transformation needs a lot of echos and metrics coming back so you know that doing this differently is really what we expected it to be and it becomes quite a fascinating process. Some people don't stay around. They say, "That's not for me," and other people don't quite know how to do it, and that's fine, and others grab the bull by the horn and run with it. You begin to see tremendous transformations happening, so it's an interesting process. It can work, it's just not easy.

Roger: One thing I'm hearing is that observing behavior and defining behavior is really important because I think that often leaders tend to talk in terms of goals and objectives, "We want to serve our customers better, be more responsible," or even, "We want to improve our net promoter score to some new number," but these are goals and outcomes, where really what you're saying is you have to see what people are doing now and focus on what they'd be doing differently in this new world.

Andi: Oh, you're spot on because those first words you said, "We want to get better net-promoter scores," sounds like, "I just need to work harder," but in fact, "I have to work differently but I'm not quite sure how to do that." It's important that we don't say words without having meaning to them, because without visualizing what that meant, how am I going to get a better net promoter score and I can only work harder by doing more of the same more often? What is it that really are we trying to achieve here?

Roger: Mm-hmm (affirmative), so one comment you make is that when you visit companies that are proud of their innovative culture

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and really empowered employees, that when you ask them they are often unable to cite any real example of innovation, why is there that disconnect?

Andi: I used to ask. I do a lot of CEO workshops and I used to start by asking, "How many of you have innovative companies?" They'd raise their hand and then I'd say, "Okay, give me an illustration," and then the hands would go down, and so there was an aspirational part here, "Of course we're innovative," and then a reality part which is, "I don't know what we're doing and I don't quite know ..." I stopped asking after a while because it was uncomfortable, but people are aspired to do things but they really don't know what that means.

We had one healthcare client who wanted to become more innovative. The CEO actually signed every check and made most decisions so we had to change it, and then I realized they didn't know what the words actually meant to be more innovative. We had to do a lot of training to begin to show them how to become more empowered and creative and testing ... and the words they could say, but when you actually watched what they were doing, they didn't know how to do it.

You know you started the conversation by saying, "Now how do I get into business instead of working on a small island," and often these are the small islands where people are comfortable doing what they've always done, and yet the business requires them to change that and it is so difficult.

There are lots of things we do. We build a lot of innovation gyms for example and we make games very useful to help the mind relax and begin to see how creative you can be. We have several of those coming up, and the innovation gym makes it manageable and next thing you know they trust it. It's not an intellectual discussion about how I have to be more innovative.

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It's an actual in where I can see how to do it and once you get going on that, they begin to do it. The next thing you know, it becomes what we do, so it's part of the process.

Roger: Great, well that's probably a pretty good place to break off Andi. Let me remind our audience that we're speaking with Andi Simon, corporate anthropologist and author of the new book "On the Brink: A Fresh Lens to Take Your Business to New Heights."

Andi, how can our listeners find you and your content online?

Andi: Thanks so much Roger for the opportunity. The book is at andisimon.com and that's A-N-D-I-S-I-M-O-N dot com. The website for our business is simonassociates.net and on that website we have lots of tools you can use, white papers, videos and other things. We're very much into being helpers because at the end of the day, you need to be able to have an epiphany about where you're going and how to get there. What we like to do is provide you with the tools you need to get that process going.

Roger: Great, well we will link to those places, to On the Brink and to any other resources we talked about on the show notes page at rogerdooley.com/podcast and we'll have a full text transcript of our conversation there too in a convenient, nicely-formatted pdf.

Andi, thanks for being on the show.

Andi: what a pleasure. Thank you so much Roger.

Thank you for joining me for this episode of the Brainfluence Podcast. To continue the discussion and to find your own path to brainy success, please visit us at RogerDooley.com.