
- Different methods are suited to the learning needs of different leaders.
- Three aspects of a leader’s evolution that suggests different development needs:
  - The level of leadership (small team to enterprise-wide)
  - The life-cycle stage of the leader
  - Role-cycle stage (where they find themselves relative to a specific role entry or exit)
- Challenges/Suggested Training
  - **Novice managers:**
    - The biggest challenge is learning to value the managerial job and shifting from doing the work to getting work done through others.
    - In-context role methods such as job-shadowing or role models may help novices to overcome gaps in understanding and performance. They also need to increase their understanding by consolidating concepts that are related to their job duties.
    - Out of context role learning such as classroom and e-learning are a critical complement to learning by doing.
  - **Middle managers:**
    - The biggest challenge is developing a point of view beyond their immediate functions or group and identifying and managing an extended set of stakeholders.
    - Core skills for middle leaders shift from the technical to the human and relational domain.
    - Simulations, 360 feedback, instruments, and networking may be more adequate at this level.
  - **Senior level managers:**
    - Challenges include increasing scope, complexity and ambiguity and gaining a business-wide perspective and long-term view.
    - Among self-learning practices, service learning, consciousness raising or transformational executive development programs allow time for reflection and analysis, as well as encourage examination of basic premises.


- Types of Leadership Training
  - **Leader development** is to enhance human capital. The primary emphasis of this development strategy is to build the intrapersonal competence of the individual, foster a mature leader identity, and enable more effective performance. Typically the focus is
on individual-based knowledge, skills, and abilities associated with formal leadership roles.

- **Leadership development**: The primary emphasis in leadership development is on building and using interpersonal competence. This perspective focuses on social capital which is about building networked relationships among individuals that enhance cooperation and resource exchange to create organizational value.
- It is thought that the most value resides in combining what is considered the traditional, individualistic approach to leader development with a more shared and relational approach to leadership development.
  - One type of leadership development program that is attracting growing attention is programs in which managers participate in activities that involve play.
    - Spearheading these play-oriented programs are the popular “outdoors programs,” in which managers are asked to overcome natural obstacles, build log structures, go whitewater rafting, walk on tightropes, hunt for treasure chests, and experiment with fictional identities.

- **Oracle White Paper**: [Seven Steps for Effective Leadership Development](#)
  - Aberdeen Group reported that two-thirds of best-in-class companies measure the percentage of key vacancies filled by internal candidates as a way to gauge the success of their succession planning function. Additionally, promoting leadership development to lower levels of the organization also has a positive impact on morale and therefore assists in employee retention.
  - Combining employee development with career planning enables employees not only to explore potential career paths but also to monitor and progress through the development activities necessary to attain them. Competencies can then be tied to relevant development activities, thereby incorporating development planning right into the performance review process, which supports career development and succession planning.
  - **Case Study: Coca-Cola**
    - Coca-Cola set out to not only identify its rising marketing stars but also to plan their development, ensuring that the company had a strong pipeline of highly creative and innovative thinkers who could be the marketing leaders of tomorrow filling senior vacancies around the world.
    - Coca-Cola partnered with international assessment consultancy SHL, which worked with Coca-Cola’s talent professionals and senior marketing leaders to create a two-day development program for high-potential marketers aspiring to become senior marketing leaders.
    - So successful has the development program been that Coca-Cola and SHL now run it every three to six months in locations around the world in an effort to ensure that Coca-Cola will never have to look outside its own talent pool to fill key strategic marketing positions vital to maintaining the brand image.

- **Unconscious Bias Training**
  - Many Roundtable Members are focusing on expanding unconscious bias training to their leaders this year. Please see 2011 Roundtable Meeting presentation below:
    - [Implicit Bias: Implications for the Workplace](#) Brian Nosek, University of Virginia, Co-Principal Investigator, Project Implicit

**Selection**

- Inc Magazine: [How to Create a Leadership Development Program](#)
  - **Case Study: Disney**
    - Disney Institute started as in-house training for Disney company staff and has expanded to offer training and development for outside organizations.
Disney learned quickly that internal leadership development was crucial to success. Leadership programs help ease the chain of succession, make employees feel more connected to the business, and can transfer good ideas from one section of your company to the whole organization.

Identifying the employees best suited for leadership can be tricky, and theories vary on how to best identify those candidates within your organization. Other companies simply put their entire staff into development programs with hopes of making everyone more effective.

Identifying the employees who bring the most energy, ambition and success into your company is a smart way to focus development dollars. Businesses should also pick instructors for the program who have a track record of good leadership. Otherwise, employees won't embrace the message.

**Measurement**

  - Best-practice organizations (e.g., GE, Shell, Johnson & Johnson) view leadership development programs as a way to increase competitive advantage and support corporate strategy.
  - It is very important to maximize transfer of training from leadership development and management education in order to get the greatest return on investment from such programs.
  - In this study, the data analyzed came from a well-respected leadership development program and institution in the western United States. The 5-day program is designed for mid- to senior-level managers to develop their leadership competencies through a feedback-intense learning experience.
  - The study focuses on the relationship between goal setting and transfer of training through measuring a 360-degree survey collected 3 months after the 5 day leadership training.
  - Leaders set personal goals for behavior change during the program.
  - **Outcome:**
    - For two of the three competences measured (developing others, building and maintaining relationships) leaders who set a goal for change on a competency were perceived as having improved more on that competency than those who did not.
    - Those who set more than one goal were perceived as having improved more across competencies than those who set only one goal.

  - The training and development team at BP concluded that it needed to develop a way to prove the companywide impact and value of training, one that would take into account the diversity of experience and opinion within the company.
  - Until that point, the company rarely measured training in a systematic way, other than obtaining basic feedback information such as how many participants attended a training session and what they thought of it.
    - The satisfaction rating didn’t tell the team what it really wanted to know: what leaders recalled from the training experience, but also what they actually put into practice over an extended period of time.
    - Obtaining that kind of information required a survey effort that takes place well after the fact, and regularly thereafter. When you got back to the office after your training, what happened?
By its nature, the subject matter of leadership isn’t well suited to that straightforward manner of testing the learner to validate knowledge gained.

- Kilpatrick Model
  The team tried to build their measurement around this model:
  - Level 1: Reaction. Do the participants like the program?
  - Level 2: Did the participants learn?
  - Level 3: Are the participants using what they learned?
  - Level 4: Does it have a bottom line approach?

- The Win Model
  The team devised a two-stage process to answer the critical question: How do we establish a link between the annual training investment of almost US$4 million and bottom-line performance?
  - Identifying expectations
    - Identify through open-ended inquiry, the key behaviors that those most affected by the training would expect to see changed by a successful leadership development program.
    - Developed an in-depth qualitative telephone survey. Translated in four different languages, the survey was completed by 300 employees worldwide. Based on the findings, seven categories of behavioral changes were identified.
  - Measuring against expectations
    - Using a combination of 300 telephone and 1,200 Internet surveys, employees were asked to evaluate leaders according to those established measures. Leaders were asked whether they had attended a training event and asked to evaluate themselves on each measure.
      - Two separate populations were established: those who had been to training and those who had not.
      - The results of the two groups were compared.
  - Results
    - Both the leader’s direct reports and their managers ascribed statistically significant better performance on every measure for those who had attended the training events, compared to those who had not.

In-house vs. External Training
- Forbes: The Great Training Robbery: Why the $60 Billion Investment in Leadership Development Is Not Working
  - Both in-house and external training have their place and purpose.
  - Although it’s not the best metric, If your training department’s key performance indicator (KPI) is to train the maximum number of employees within a certain budget, then they will almost always choose in-house training.
  - If you need to skill up a large number of employees on key capabilities your company needs, then in-house training might be the best answer.
  - If you want to expand the minds of a few high potential leaders, sending them to open enrolment programs is the right approach. By networking with executives from other companies, and by learning in an environment away from one’s daily workplace, participants often take fresh thinking back to their companies.
Open programs also provide participants with a safe environment to challenge their thinking and try new skills, something that is not always possible in in-house programs.

- The training budget should therefore be carefully allocated over both options. Over using either approach can be inefficient.

**ROUNDTABLE MEMBER BENCHMARKING**

1. What are the criteria used to determine what leadership development content is offered? (i.e., is this by level, by role, by content, by initiative/strategy, etc.)?
2. What factors are used to select participants (nomination-based or open-registration & what are the criteria for each)?
3. How is the value of Leadership Development programs defined? (The impact these programs have on the organization.) How are they measured and monitored for value/metrics?
4. What percent of offerings are developed internally versus leveraging external partnerships/vendors (and how are these determined)?

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1. It would be a combination of all of those things. We have a variety of leadership development programs which are targeted to varying audiences and therefore have different content subjects, different depth/breadth of material explored, different functional focus, etc.
2. Also a combination here – most of our higher-level leadership development programs are nomination-based. We do have some eLearning courses related to leadership development and these are available to everyone. We also have some programs for lower-level managers (1st or 2nd time managers) that are required leadership training, and some others that are optional.
3. These programs enable us to build a strong, diverse leadership pipeline that will support our company’s future growth. We track placements, promotions, etc. to determine whether program participants are progressing in their careers.
4. This is a mix – our bias is to use existing/internal resources where possible, but then would turn to trusted vendors when we don’t have the expertise in-house.

**Deere & Company**
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1. For John Deere leadership development is delivered primarily in two ways – skill based on the job learning and leadership development courses and programs. And I believe the question is around development courses. Criteria for leadership course content are established by needs analysis. Courses are segmented by leadership level and the needs for that level are considered. There may be Leadership Learning Council (senior leaders) who are asked their opinion on needs, gaps, strengths of programs by level and that data is also used.
2. Selection for several leadership development programs is nomination based. Some of the criteria includes ultimate potential succession planning assessment, performance rating, time in position,
previous attendance at other leadership programs, gender and ethnicity considerations, advanced
degree considerations. There are some entry level leadership programs that are open enrollment
based upon manager approval. There is at least one program where the Chairman selects the
participants based on succession planning assessment and executive opinion
3. The majority of these programs are subjectively measured – selection into the program is just as
important as the course learning’s. For a couple of the higher end programs metrics – individuals
who attend typically move upward in the organization in a reasonable amount of time. Courses are
reviewed for content. This is definitely an area of enhancement for Deere
4. The majority of courses 90% are developed by vendors – Deere determines the leadership
development needs, learning criteria and then seeks a vendor who can deliver the content. This model
is used around the world in Deere locations. Deere has gone away from having many company
dedicated course developers. John Deere Learning is segmented into Learning Colleges that contain
core and recommended classes. Leadership College is one of several colleges. Most of the courses
in each college are delivered by vendors or individuals trained to deliver the vendor content. There
may be local development needs in areas around the world where a course may be developed. This
decision is made at the local level.