Integrated Leader Development

Transforming People, Projects & Organizations

Deloitte Consulting LLP
May 2011

Presented by
Mick Keller, PMP
Kirk Mensch, PhD
Contents

Evolution of Human Resources

Holistic Human Resource Development

Importance & Challenge of True Leader Development

A Conceptual Framework for Developing Leaders

From Theory to Practice at Marine Corps Intelligence

Questions
Evolution of HR to an Integrated Perspective on Talent

With the evolution of HR from just a payroll department, there has been a growing recognition that **well-integrated** rewards, talent programs, and strategies equip an organization to accomplish business objectives.

“The broad goals of “building” employees through internal movement generally fit into four categories: increasing employee impact, motivation and retention, leadership development, and skill improvement.” – Dr. John Sullivan

- **Personnel Dept.**
  - Payroll, Benefits

- **Strategic HR**
  - Recruiting, L&D, Org Design, Total Compensation, Communications

- **Holistic HRD**
  - Competency-based programs
  - Performance Management
  - Career Development
  - Strategic Workforce Plans
  - Leadership Development

**Org & Talent and Total Rewards**

- Career opportunities
  - Career planning
  - Competency modeling
  - Training programs

- Culture
  - Leadership styles
  - Communication/Decision making

- Physical Environment
  - Interactions with others

- Benefits
- Compensation
Think Leader Development in the context of Total Rewards & HRD

An organization may be struggling at HRD if:

- **Retention** is an issue
- **IDP’s** are just some form to fill out
- No one is responsible for **employee development**
- Someone asks “what is a **career roadmap**?”
- **Workforce Planning** = Recruiting
- No **formalized** leader development
- **Performance management system** is not viewed positively by people in the organization
- Issues with **relationships & trust**
Most Leader Development Programs can be likened to make-shift mansions...

...they may have a lot of “floor space”, but with most...the pink flamingos aren't real, the pond ain’t no pool, and a strong wind might rearrange everything.
“Leaderful practice constitutes a direct challenge to the conventional view of leadership as ‘being out in front’... everyone will need to share the experience of serving as a leader, not sequentially, but concurrently and collectively. ... Each member of the organization will be encouraged to make a unique contribution to its growth, both independently and interdependently with others.”

• ~ Joseph A. Raelin (2005)
• Northeastern University
The Challenge of Leader Development

We define Leader development as – the purposeful expansion of the capacities of individuals to effectively demonstrate leadership behaviors.

THE CHALLENGE

• 2008 meta-research study, 75% of company CEOs say building leadership capability is one of the top workforce challenges. (2008 Global CEO Study from IBM)
• 1970-1990s, leadership preparation was met through education such as MBA programs and traditional training. (1996 Planning Review Article)
• End of the 1990s, looking for new ways to develop leaders that lead to sustainable behavioral change in both hard and soft skills that is seen in coaching and other one-on-one methodologies.

THE SHIFT

• In the 2000s, we see a shift in development to action and experiential learning, coaching, increased mentoring relationships, and holistic approaches outside of traditional classrooms. (2002 Kellogg Study of 55 Global Leader Development Programs)
Rethinking How to Develop Leaders

THE NEED
• New skills, abilities, and competencies are needed from managers and leaders in the 21st century (increased complexity, need for collaboration, security, etc.)
• Diversity of workforce – not just the big “D” (generations, leadership differences, prior work experience, ethnicity, religion, educational background, etc.)

THE RESEARCH
• Everyone needs to share the experience of serving as a leader, not sequentially, but concurrently and collectively. (Raelin, 2005)
• Anyone in any role/position can be developed to become a more effective leader
• Leader development occurs at multiple levels in an ongoing, dynamic fashion across the lifespan of each employee
• A lifelong learning attitude must be nurtured and encouraged by leadership (Day, Harrison, Halpin, 2009)

A key for a successful program is to build a sound, organizationally specific, research-based model that guides the design of the program & encourages effective measurement of outcomes.
Leader Development Conceptual Framework

Self-Directed Lifelong Learning
- Initiative
- Resourcefulness
- Persistence

Organizational Culture
- Expectations
- Values

Domain of Inquiry
- Knowledge
- Wisdom

Skills
- Professional
  - Abilities
  - Qualities

Identity
- Personal
  - Epistemic
  - Moral

Transformational Process
- Assess
- Challenge
- Support
- Account

General Leadership Competencies

Leadership competencies can be customized to the needs of the organization. We expect many if not most of these will apply to all organizations but do not assume that is the case for any particular organization.

1. Leading Change
2. Leading People
3. Managing People
4. Results Driven
5. Building Coalitions
6. Exhibiting Courage, Confidence, and Commitment
7. Facilitating Accountability
8. Self-Directed Learning
9. Community Distinctives and Organizational Focus
Important Considerations in Designing a Customized Leader Development Program

- **Buy-in** from top leadership - program tied to a primary mission objectives such as succession planning and other talent strategies (i.e. to attract, develop, and retain talented individuals)

- Interview organizational leaders, learn the culture & needs, focus groups & surveys with supervisor and non-supervisor audience

- Form strategic leader development advisory group that works hand-in-hand with consulting team on design & implementation of program

- Adapt most current research & best practices
  - To customize the program
  - To develop Program Outcomes
  - To develop/adapt Program Competencies
  - To facilitate true transformational change

- Develop research based assessment both short and long term to measure program outcomes & effectiveness

- If you are a leader in your organization, you have influence
The Ka-Bar Leader Development Program

Case Study

Marine Corps Intelligence (MCI)

Leadership on the Cutting Edge
Reasons for Developing Ka-Bar

- Unique culture of USMC and the Intelligence Community requires unique leader development solution
- Inability of interagency and government wide programs to encourage personal transformation and address cultural issues
- Changing performance management expectations
- Unique working relationship between civilian & military personnel
- Increased need for peer to peer relationships
- Succession planning and management
- Retention and employee satisfaction
- Recognized differentiation between managing and leading
Research based Model for Ka-Bar

Self Directed Lifelong Learning

- **Intelligence Community Focus** (Learning Modules 10-12)
  - *Collaboration*
  - *Integration*
  - *Enterprise*
  - *Values*

- **Personal Sphere** (Learning Modules 1-2)
  - *Moral*
  - *Identity*
  - *Critical Thinking*

- **Management Tradecraft** (Learning Modules 6-9)
  - *Results*
  - *Decisions*
  - *Managing*
  - *Strategy*

- **Leadership Skills** (Learning Modules 3-5)
  - *Traits*
  - *Communication*
  - *Change*
  - *Diversity*

*Collaboration*
*Integration*
*Enterprise*
*Values*
*Moral*
*Identity*
*Critical Thinking*
*Traits*
*Communication*
*Change*
*Diversity*

Experiential

Transformative

Deloitte
Sources of Learning are the primary methods of delivering learning activities. The most successful leader development programs use a combination of sources of learning:

1. Discussion Learning
2. e-learning
3. Expert Speaker Series
4. Self Assessments with debriefs and reflection
5. Action & experiential group learning
6. Individual Coaching & Mentoring
7. Changing learning environments
8. Games & Simulations
9. Lecture participation with response systems
10. Cases (audio, video material)
11. Deloitte methodologies (i.e. Deep Dive®)
12. Open Space Technology (participants guide the learning)
13. Off-site Retreat
Roadmap for USMC Intel Leader Development

**Design – Bring Theory to Practice**
- Organizational Assessment
- Customized Program Design & Branding
- Form Client Senior Advisory Group & Create by In

**Develop**
- Curriculum Development
- Design Research Based Assessments
- Launch Communications & Marketing Campaign

**Implement**
- Execute Pilot Program
- Pre-test & Post-test Participants with Cognitive/Behavioral Instruments
- Initiate Train the Trainer (T3)

**Assess**
- Analyze Quantitative & Qualitative Research Data
- Evaluate Program Effectiveness, Strengths, Weaknesses, and Gaps

**Improve**
- Employ Sustainability Measures
- Complete Recommended Changes to Curriculum and Delivery
- Identify and Employ Long Term Programmatic Assessment Techniques
Design Phase Resulted in…

1. **Cohort Size**: 8-15 participants
2. **Length of Program**: 12 weeks
3. **Timeframe**: 2 full days per week

<table>
<thead>
<tr>
<th><strong>EXAMPLE</strong></th>
<th><strong>Monday</strong></th>
<th><strong>Tuesday</strong></th>
<th><strong>Wednesday</strong></th>
<th><strong>Thursday</strong></th>
<th><strong>Friday</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>AM 9-12</td>
<td></td>
<td>Module</td>
<td>Module</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lunch</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PM 1-4</td>
<td></td>
<td>Module</td>
<td>Module</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>3 hours</td>
<td>6 hours</td>
<td>6 hours</td>
<td>3 hours</td>
<td></td>
</tr>
<tr>
<td></td>
<td>study time</td>
<td>in learning</td>
<td>in learning</td>
<td>study time</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>modules</td>
<td>modules</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. **3-Day Off-Site Learning Retreat**: During week 2
5. **Total hours spent per participant**: 15-20 hours per week
Cohort Learning Environment

A Cohort is a **small group** of people who move through a program at the same time and speed and therefore **experience** the assessments and debriefs, challenges and support, and all of the other experiential and action learning sources together. Successful cohort-style learning groups include:

- **Unique transparent relationships** form where trust is formed, dialogue opens up, and learning is encouraged.
- **Confidentiality** is discussed up-front as a necessary first step to building trust, transparency, and authenticity.
- **Authentic** relationships are “real: we don’t have to maintain different public and private faces. Who we are inside is who we are outside” One way to foster this is to take time to share life stories. These stories can take 10-20 minutes, and they offer **significant moments** in your life that you care deeply about and that are specific and self-revealing, but also shares that you are human.
A textbook can be customized and edited by Deloitte consultants and developed in partnership with a major publishing house.

Our current relationship is with McGraw Hill and the text focuses on both the personal and professional sphere’s of development:

1. **Personal Sphere**
   - Identity Development
   - Moral Development
   - Epistemic Development

2. **Professional Sphere**
   - Leadership Skills
   - Management Tradecraft
   - Organization Strategy Focus

Program Assessment
Mixed Methods Research Design

**General Quasi-Experimental Design:**
Pre-test > (intervention) > Post-test > (6 months) > Post test

**Quantitative Analysis** aims at evaluating the following cognitive aspects of the leader development phenomenon:

- Self-Directed Learning *(Learner Autonomy Profile)*
- Critical Thinking *(Watson-Glaser Critical Thinking Appraisal)*
- Moral Development/Judgment *(Defining Issues Test – DIT2)*
- Identity Development *(Battery - Org. Commitment, Job Satisfaction, Work/Life Balance, Work Productivity, Self Efficacy)*

**Qualitative Analysis** is critical in understanding program value and to support/confirm quantitative analysis:

- Participant interviews and written narrative analysis of themes indicating growth and “transformation” for each participant and across participants

Note: Results are presented to client as a publishable research study
Alumni of the Ka-Bar leader development program are invited to continue the pursuit of lifelong learning within a leadership community of practice through:

1. Meeting monthly in “alumni learning circles” or communities-of-practice
   • Opportunities to share challenges
   • Support group for those who supervise & manage
   • Voluntary accountability for those who seek to continue learning

2. Facilitating future cohorts

3. Serving as a mentor to future Ka-Bar participants

4. Interagency Collaboration & Knowledge Sharing

5. Encouragement of Trade or Journal Publications
Quotes from “Ka-Bar” Graduates

“I hoped that I would learn something during my time in the program that would make me a more effective manager and a better leader. I honestly believe that I have accomplished both. Ka-Bar has increased my awareness of myself and really keyed me in to my strengths and weaknesses. I truly believe the program was a success.”

“The Ka-Bar Leadership Program impacted me by showing me the hidden aspects of leadership. I learned about leadership traits and principles all through my career, but now I understand better the philosophical aspects and drivers behind leadership.”

“Ka-Bar has given me a better understanding of my own leadership strengths and weaknesses. This has been the beginning of my journey to inspire and empower others in the future.”

“Ka-Bar was a fantastic experience for me. I feel I am on a journey of greater self reflection and knowledge which will help me become a better leader.”
HRD in Action: The Marine Corps Intel Story

**Keys to Success**

- Integration with Intel Community organizational missions, competencies, and critical factors
- Connect personal and organizational values and mission across the Intel Community
- Create the conditions for the enhancement of organizational environment that encourages trust
- Set up individuals and the organization for future success

Iterative  Building trust  Forward-thinking

- Performance Management
- Leadership Development (Ka-Bar)
- Career Development & Workforce Planning

Deloitte
Questions?

Michele R. Keller, PMP
Deloitte Consulting LLP
Tel (717) 695-5215
mikeller@deloitte.com

Kirk G. Mensch, Ph.D.
Deloitte Consulting LLP
Tel (717) 450-5733
kmensch@deloitte.com