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Executive Core Case Study:

Developing Enterprise-wide Leadership
Through the Integration of Action-Learning, Specific Executive
Skill Set Workshops, and Aligned Individual Executive Coaching

by Gary Myszkowski, Ph.D.
Senior Talent Management Executive
Executive Core

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Executive Summary:

The case is actually the synthesis of at least four client programs that share the common of goal of developing the next generation of senior executives with enterprise-wide strategic leadership capabilities. The case study highlights the programs' similar approaches to integrating action-learning processes, the delivery of specific executive skill set workshops, and individual executive coaching while aligning each individual's development needs with the common target enterprise-wide leadership competency model. As assessed by the client program sponsors, the leveraging of a multipronged approach accelerated the development of a cadre of high potential executives and increased their readiness to advance to key roles requiring enterprise-wide competencies. In some cases, the clients sponsored similar programs for three or more successive waves of executive participants over the following four to five years.

Disclaimer

This case study is the disguised synthesis of four similar enterprise-wide leadership programs that members of Executive Core have co-designed and / or co-delivered for over the past ten years. These clients were all Fortune 500 businesses. All but one of these clients consider the specifics of their respective programs to be a source of competitive advantage for the purposes of senior executive talent development and improved business results. One program was more publicly visible as a result of receiving an award for excellence in executive development. No identifying information of the companies, individual participants, or company-specific program design elements is described here. Instead, the essential common elements of the programs and the advantages of using a multipronged development approach are identified and described. Any similarity with an existing or recent program is coincidental and reflective of the growing acceptance and use of custom in-house intensive leadership development programs using these methods.

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Context: The Need for ACME to Aggressively Develop Executives with an Enterprise-Wide Perspective

ACME Corporation[1] is a global company that was formed as a US-based manufacturing[2] company shortly after WW II. Over the years, ACME slowly evolved into a multi-national company, expanding first into North America and Europe. It dabbled selectively in South American manufacturing and distribution locations, but was reluctant to invest more in that region due to continuing geopolitical unrest, disruptions, and uncertainty. In contrast with its historical strategic intent of being a "fast follower," the current generation of top executives desire a more aggressive entry into China and other Asian countries, where there is a growing significant middle class who are potential customers of ACME's products. Through the years, the company has maintained its headquarters in the US Midwest, populated largely by US-born executives and managers.

The strategic decision to more aggressively enter Asian markets is critical to achieving ACME's future growth aspirations. The next generation of ACME leaders will need intimate knowledge of how to conduct business in Asia, an ability to recognize subtle changes and trends in current ACME national and regional markets, and a surveillance of emerging markets where ACME might want to risk being a first mover with a committed entry.

Historically, ACME selected and developed a cadre of executives with multinational experience. This multinational executive talent pool was developed largely through rotational assignments across several countries and the informal coaching they may or may not have received from their predecessors, peers, and senior executives. Using these methods, it often took 15 to 20 years for ACME to develop a senior multinational executive, such as a country manager. In addition, only the few very senior executives at the top of house possessed an enterprise-wide perspective of the business, ACME's strategies for its portfolio of businesses and locations, and the business, political, and economic trends that would cause the company to adjust or change those strategies. To pursue its growth aspirations, ACME now needed to grow a cadre of executives with an enterprise-wide strategic perspective quickly.

Footnote 1: This company is often confused with the ACME company that was the preferred supplier of Wile E. Coyote of Warner Bros. Looney Tunes and Merrie Melodies cartoon fame. In contrast, the ACME referred to in this article assures us, for example, that its "Rocket Powered Roller Skates" are much more manageable, stable, and reliable than those depicted by the fictional cartoon company.

Footnote 2: We consciously did not identify the range of products produced by ACME because we want to focus the case study readers' attentions on the learning program and not on ACME's marketing, manufacturing, or supply chain practices.

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The Alternatives for Enterprise-wide Leadership Development

In the past, ACME had selectively sent some of its "high potential" executives to university-based Executive MBA programs and a few free-standing Global Executive MBA programs. To be considered as part of the multinational executive pool, "high potential" executives were developed through rotational assignments across national and regional boundaries and expat assignments. Individual executive coaching provided by external professionals was offered either in response to the request of an individual "high potential" executive or as a remedial intervention when a valued executive was underperforming or potentially derailing. Executive coaching was not systematically used for development of "high potential" executives.

The Limitations of MBA Programs

While the external EMBA programs were an excellent introduction to an array of business tools and conceptual frameworks that were designed to build the foundation for an enterprise-wide view, ACME participants studied many facets of multinational or global business that did not, and probably would not, directly relate to the specific challenges facing ACME. In a sense, for the time and money spent, they were often a little too generic, trying to reach students from an array of businesses and industries.

The Challenges with Delivering In-house Custom Executive Development Programs

Customized in-house executive education programs provided an opportunity to align the learning opportunity with the specific and sometimes unique challenges facing the ACME businesses. The biggest hurdle to successfully designing and implementing these programs was not the willing availability of ACME senior executives to actively participate in the "teaching" (they readily made themselves available), but it was finding the very few university-based academic subject matter experts who would actually tailor their presentations to the specifications of ACME. Instead, ACME Chief Learning Officers often experienced the university faculty member delivering the exact same lecture or presentation he or she gave two weeks prior in the university-based day MBA program or the EMBA program. Co-designing was apparently not a developed competency among university faculty members. A second deficit was the apparent trend of the faculty to overestimate their abilities to facilitate the discussions of intact business teams. Instead, they tended to dominate those discussions instead of create space for those teams to learn how to have constructive and often contentious discussions without the frequent facilitation (or interruption) from an external facilitator.

The Incomplete Leveraging of Expat Rotational Assignments

High potential rotational assignments were considered to be extremely valuable but not very consistent or efficient. The opportunity to glean the insights and wisdom from ACME executives and "others who had gone before" was highly dependent on the willingness and abilities of the hosting or sponsoring executives at the rotational location to coach and mentor the executive in the rotational assignment. Also, the learning outcomes of those assignments were never specifically identified, communicated, or evaluated. Executives were given a rotational assignment and it was hoped they would "learn something." The approach to developing these executives was often haphazard and the developmental outcomes were uneven at best.

Executive Coaching Used for One-off Applications

Putting aside the use of professional executive coaching for remedial purposes, most of the "high potential" executive coaching focused on the coachee mastering his or her role as quickly as possible and stretching to new experiences that would pull for the competencies and perspective that the coachee would most likely need in the next most probable advancement opportunities he or she was being considered for. The developmental objectives were typically not targeted at a set of enterprise-wide leadership competencies.

The Opportunity for Synergy

So, if the alternative approaches to developing the next generation of enterprise-wide executives was rather fragmented, only partially targeted at the challenges of ACME, and not focused on developing a specific set of executive competencies, what would happen if the approaches were modified, integrated, and aligned? Would there be some synergy of the most effective aspects of each to create an intense and highly effectively learning process? And could the program and learning process be co-created and co-delivered through collaboration of internal subject matter experts, thought leaders, and decision makers with external subject matter experts on executive learning? Through co-creation and co-delivery, the program would come to be owned by the ACME sponsors, leaders, and participants in the program, versus being an externally-generated program owned by some vendor. That integration would eventually be co-designed and co-delivered as the ACME OWL program.

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The Fundamental Design of the ACME OWL (Organization-wide Leadership) Program

After a number of consultative discussions and iterative attempts at identifying the desired goals and outcome of the OWL program, the ACME exploratory team confirmed the following with ACME senior management:

"OWL is a six-month intensive learning experience, aimed at preparing executives at the Vice President level and above for the current and future business challenges ACME faces in an ever-increasing complex global marketplace."

The learning challenge: OWL[3] is expected to shape the next generation of ACME executives who must be able to compete collectively, operate independently, and manage collaboratively.
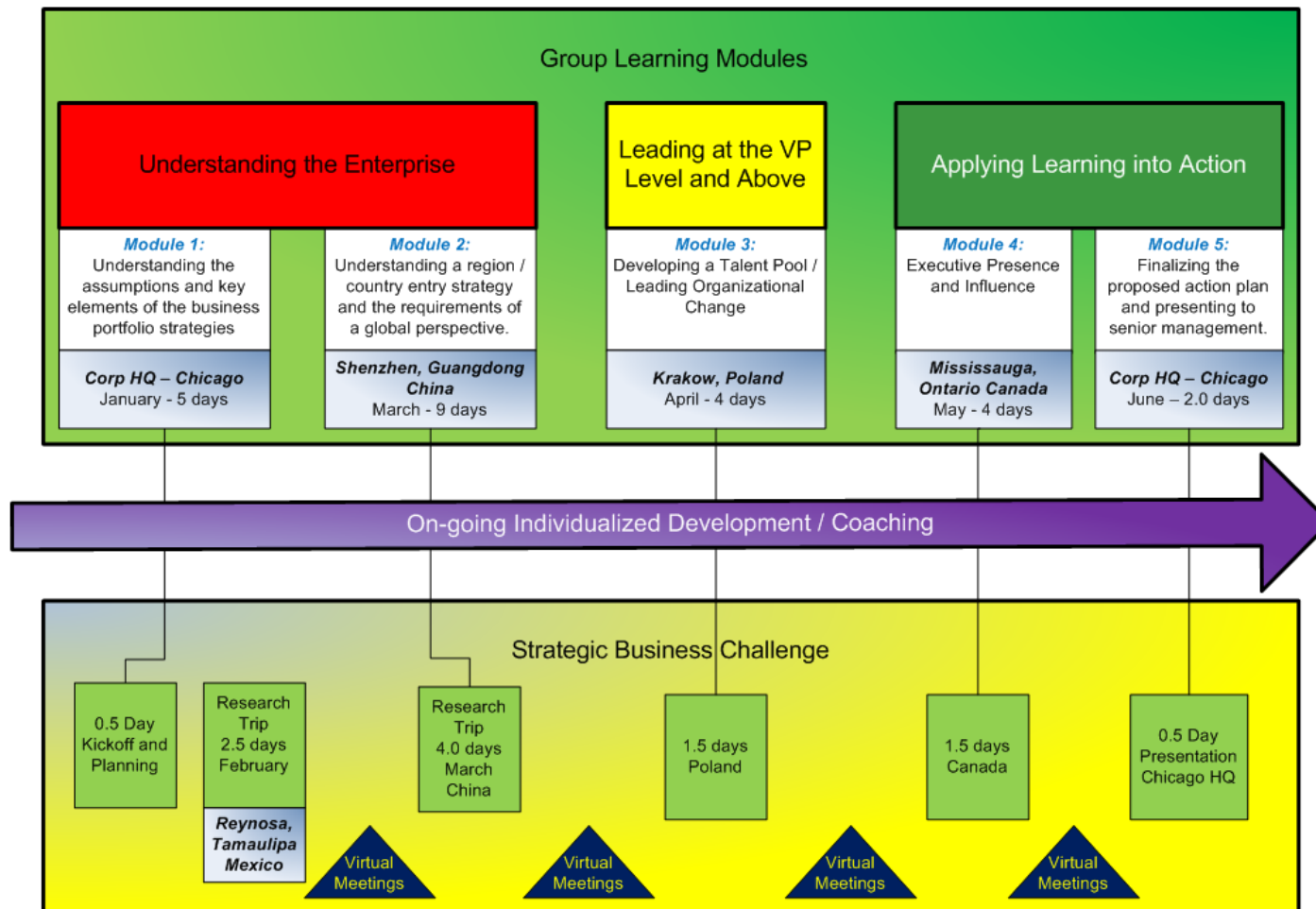
Desired Outcomes for Program:
- Initial proficiency to formulate and implement an enterprise-wide strategy.
- Growing proficiency to diagnose and proactively shape the world-wide operating environment in terms of regulatory, economic, and social dynamics.
- Address talent capability as a core part of ACME's business strategy and foster employee engagement.
- Understand and exhibit executive presence at the senior-most levels.
- Plan, organize and execute projects across ACME's divisions and matrix organizations.
- Understand and transcend personal boundaries.

Note 3: The OWL program was originally named the "Breakthrough Organization-Wide Executive Leadership" program but someone representing Marketing on the co-design team successfully nixed that idea before it developed any momentum.

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Overview of the Multipronged Learning Approach of the ACME OWL Program

ACME Organization-Wide Leadership Program (OWL)

Group Learning Modules

Understanding the Enterprise		Leading at the VP Level and Above	Applying Learning into Action	
Module 1: Understanding the assumptions and key elements of the business portfolio strategies	**Module 2:** Understanding a region / country entry strategy and the requirements of a global perspective.	**Module 3:** Developing a Talent Pool / Leading Organizational Change	**Module 4:** Executive Presence and Influence	**Module 5:** Finalizing the proposed action plan and presenting to senior management.
Corp HQ – Chicago January - 5 days	*Shenzhen, Guangdong China* March - 9 days	*Krakow, Poland* April - 4 days	*Mississauga, Ontario Canada* May - 4 days	*Corp HQ – Chicago* June – 2.0 days

On-going Individualized Development / Coaching

Strategic Business Challenge

0.5 Day Kickoff and Planning	Research Trip 2.5 days February *Reynosa, Tamaulipa Mexico*	Research Trip 4.0 days March China	1.5 days Poland	1.5 days Canada	0.5 Day Presentation Chicago HQ

Virtual Meetings — Virtual Meetings — Virtual Meetings — Virtual Meetings

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The OWL Group Learning Components Integrated with the Strategic Business Challenge (Action Learning)

The Group Learning Modules were a common learning experience for all of the participants. Each module was a mixture of didactic presentations or workshops offered by external subject matter experts, or, presentations, discussions and Q&A with internal senior executives or internal subject matter experts.

Module 1: Understanding the assumptions and key elements of the business portfolio strategies.

This presentation and discussion with senior executives and internal subject matter experts allowed the participants to comprehend the thinking, assumptions, and choices behind the current business strategies and the competitive or environmental factors that would cause ACME to reconsider, adjust, or abandon its strategies. One of the learning goals for this module is the appreciation for a need to deal with uncertainty and incomplete information, while ensuring that AMCE is also externally focused and not just focused on current internal operations.

Module 1 was conducted at ACME's corporate headquarters in Chicago to symbolize the importance and implications of being selected as a participant for this program.

Strategic Business Challenge Kick Off as Part of Module 1

The senior executive sponsor for the Strategic Business Challenge gave the participant group the assignment of formulating a more aggressive and effective country-entry strategy into China and a few select other regional countries. An external facilitator from Executive Core would guide the group through its research, analysis, diagnosis, planning and presentation of a proposed solution. The intended goals, business challenge process, deliverables, and timelines were described over the course of four hours.

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Strategic Business Challenge: Research Trip to Reynosa, Tamaulipa, Mexico (before Module 2)

The primary objectives of this research trip was to learn from the successes, lessons learned, and shortcomings of ACME's continued efforts to more aggressively enter Mexico and South American. The group met with the top management of this facility with the intent to talk candidly about the continuing challenges facing ACME and what it learned from its past experience. This experience would provide a real introduction to ACME's country entry capabilities as preparation for Module 2. Virtual meetings were also conducted among the Strategic Business Challenge sub-teams to begin to identify and contact other ACME internal sources of insight and experience before the China trip (Module 2).

Module 2: Understanding a region / country entry strategy and the requirements of a global perspective.

While in China, the group had an opportunity to meet with several external consultants about the best practice processes for entry into China and the cultural and social mores that created Chinese expectations for acceptable business practices and behaviors. The first module described the challenges in dealing effectively with multiple Chinese Ministries. The research component included consultations with several Chinese national representatives who received their MBAs in the US and now represented US companies to Chinese partners, alliances, and a few mainland China companies. A site visit to a local manufacturer who produced products similar to ACME's and represented a possible future contract manufacturer completed the research component. Module 2 finished with a review of other possible priority Asian countries for entry beyond China with an external consultant. Virtual meetings were conducted to consolidate and verify the Strategic Business Challenge teams' learning from Module 2.

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Module 3: Developing a Talent Pool / Leading Organizational Change

Beyond North America, Europe was ACME's second major regional market of expansion. It was AMCE's first experience with populating key regional positions with non-US, European nationals and learning to trust them to run the business in the best interest of ACME and not the primary interest of the local national employees or governments. One major component of the didactic learning in workshops with external consultants included experience with models to lead large scale organizational change over time against the constraints of specific European governments. The second major component identified the best practices for senior executives to create and manage a pool of executive talent below them. This was complemented by a workshop in how each executive could effectively coach his or her direct reports. Research was also conducted with the top executives at ACME Krakow technology center on how to manage intellectual property across national boundaries. Virtual meetings were implemented among the Strategic Business Challenge Team sub-teams to begin to formulate a long range country entry strategy into China.

Module 4: Executive Presence and Influence

Each of the Canadian provinces offered different regulatory and political challenges that ACME has had to address over the past forty years. While visiting the ACME Canadian headquarters and technology center the group also attended workshops on executive presence and influence. Participants began to plan influence strategies for both creating receptivity within ACME for the proposed solution to the Strategic Business Challenge but also to key decision makers and influencers in China assuming the proposal would be accepted by ACME senior management. Virtual team meetings occurred among all of the team members and sub-team members to finalize the proposed solution into a sequence of presentations given by specific participants of the OWL program.

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Module 5: Finalizing the proposed action plan and presenting to senior management.

Day 1 was primarily invested in timed rehearsals of the sequences of presentations, feedback for refinement of delivery, modifications and simplification of the supporting slides, and preparation for anticipated questions and the most effective answers.

Day 2 included the presentation to senior management, feedback and an initial response to the proposed business solutions, and a celebration of the learning program regardless of the degree to which the recommendations were immediately accepted.

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The Ongoing Aligned Individualized Development and Coaching Processes

The individualized development program was designed to specify the target set of competencies that all participants would probably be attempting to develop and demonstrate throughout their remaining careers with ACME. It was not assumed that everyone would be flush with the competencies by the time the six month program was completed.

A shown below, the co-creation of these target competencies required the facilitation of an internal expert panel of experienced ACME executives supplemented and informed by external Executive Core consultants and other available subject matter experts. As a target or standard for development, the Organization-Wide Leadership (OWL) competency model needed to be accurate, valid, and owned by the executives who would use the model for their own development, the development of their direct reports, and for selection and advancement decisions.

Once the OWL competency model was defined with behavioral indicators, ACME OWL participants selected their 360° feedback respondents pending review and refinement by ACME HR and senior management. Given the fewest competencies that would make the greatest difference in performance, the sponsors also wanted to ensure that the participants received balanced feedback from those who had an opportunity to observe the participants' recent typical behaviors and performances in successful endeavors and in very challenging circumstances.

Concurrently, each of the external Executive Core senior executive coaches selected by each participant (some coaches were selected by more than one participant) were oriented to the content and intended learning outcomes of each of the group learning modules as well as the Strategic Business Challenge, so the coach could integrate them into the individual coaching sessions.

For the first OWL program, there would 20 participants.

Preparation for ACME OWL Individual Coaching
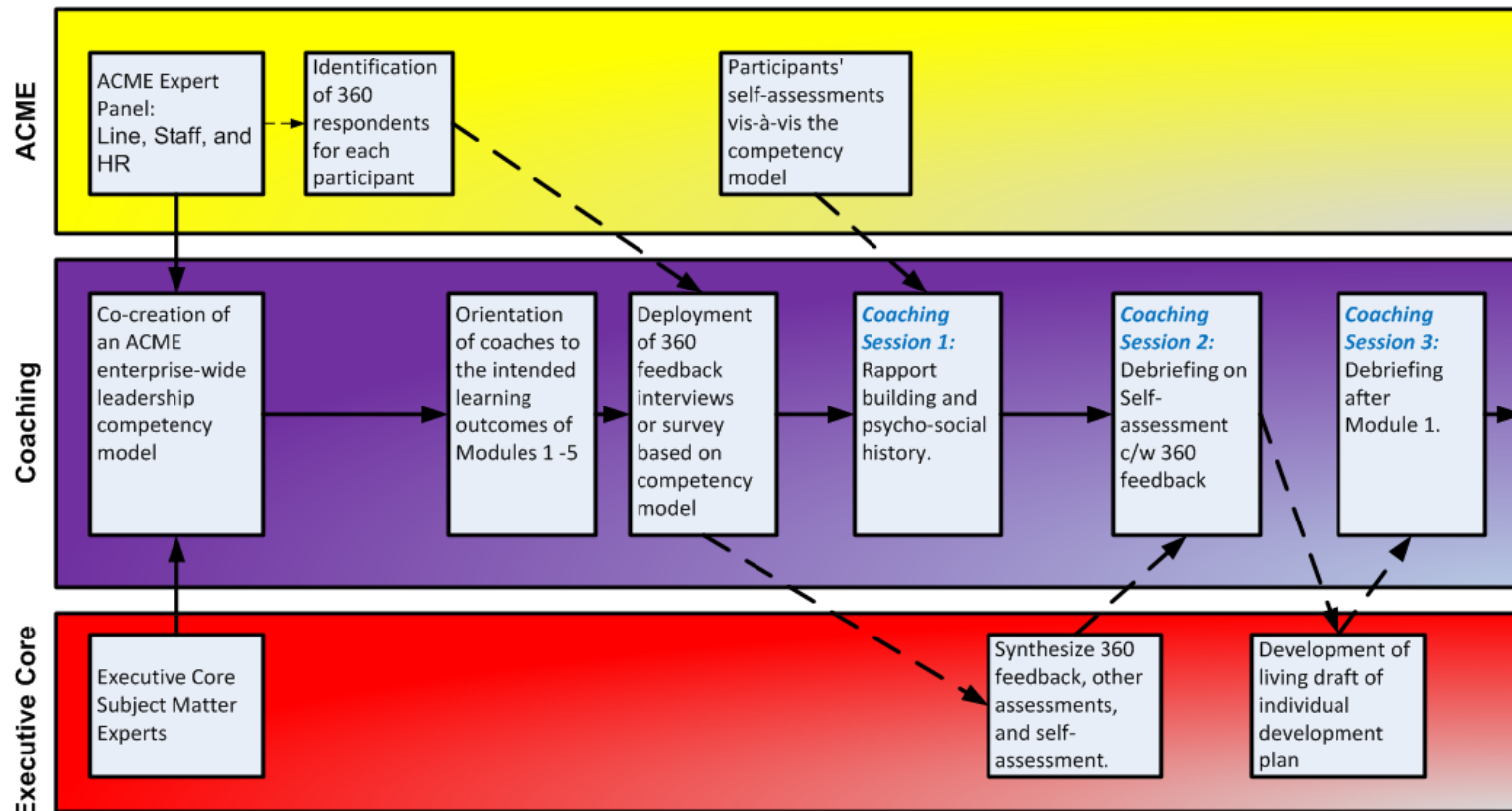
The 360° feedback process was implemented and the results of each respondent were consolidated either in a survey aggregate report or by synthesis of the respondent interviews by the respective Executive Core senior executive coach. The report was reviewed by the coach and provided to the OWL participant just prior to Coaching Session 2.

Coaching Session 1 allowed the Executive Core senior executive coach to orient the OWL participant to the intended process and outcomes of the entire OWL program and answer any emerging questions before engaging in the first steps of the program. The executive coach also obtained a psychosocial history from the respondent with the intent to identify characteristic patterns of behaviors that were either consistent with and supportive of the competency model or potential strong preferences or personality characteristics that would need to be consciously managed in order to improve the executive's performance in a role focused on enterprise-wide leadership and influence. By focusing on the OWL participant's self-assessment and inviting the executive to be more self-disclosing about the high and low points of his or her personal and professional history, the coach develops a beginning sense of trust and rapport in the coaching relationship.

Coaching Session 2 was an opportunity for the OWL participant to compare his or her own self assessment vis-à-vis the ACME Enterprise-wide Leadership competency model and the 360 feedback from others. This allows the coach and participant to confirm strengths, development needs, potential blind spots, and possible strong preferences or personality characteristics that will require conscious management in order to improve leadership effectiveness.
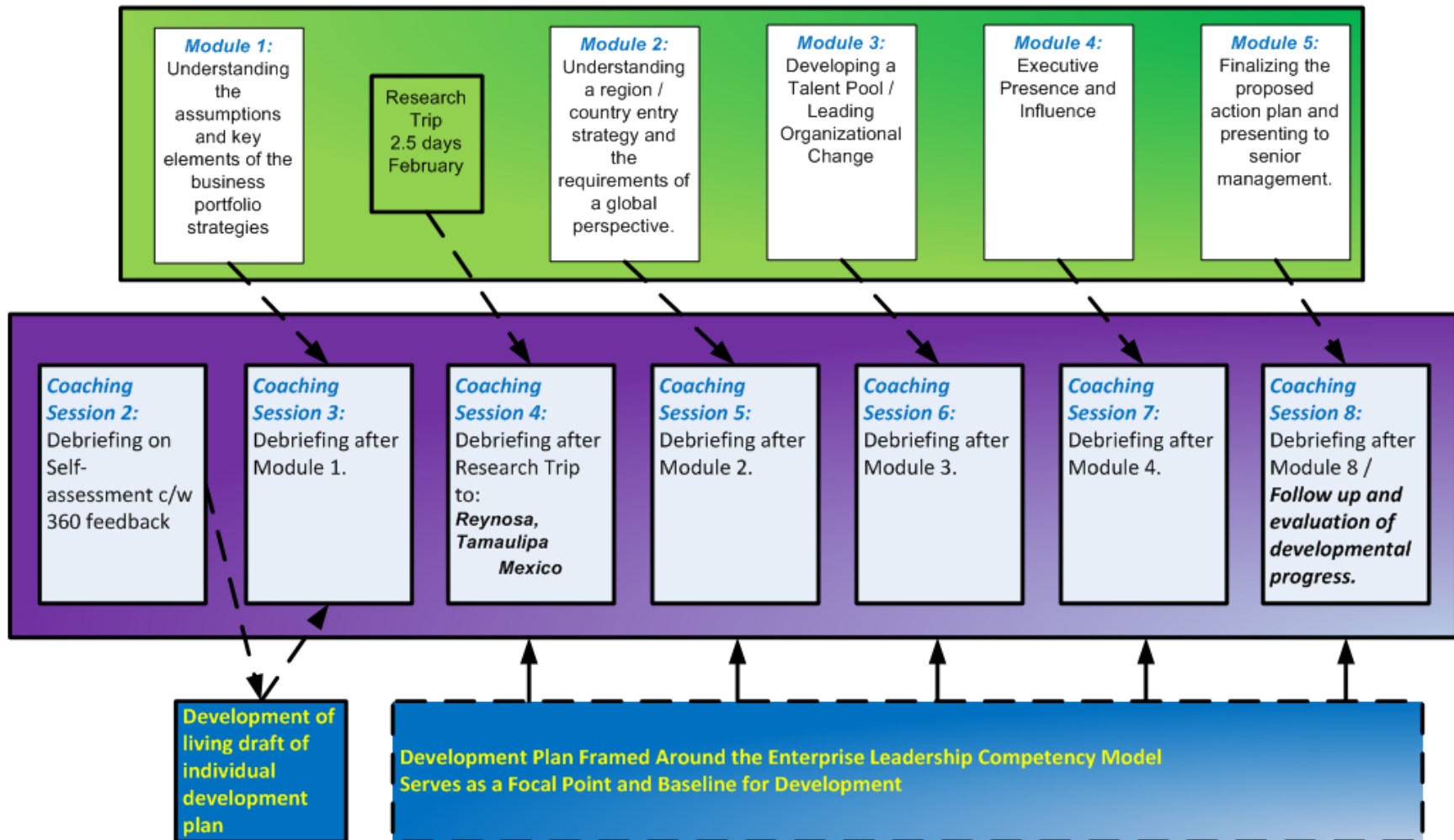
After the Coaching Session 2, the executive coach created an individual development plan (IDP) for the OWL participants. This plan was considered "a living document" that would be refined as the executive had new experiences either in the OWL Modules or in the Strategic Business Challenge. The IDP served as a baseline and guide for the coaching discussions to ensure that the intended program learning and the initial developmental needs of the participating executive were being integrated into attempts at new and more effective behaviors for the executive.

Each following coaching session inquired about the OWL participant's learning from the most recent Module or Research Trip and compared that to the intended learning outcomes. Blind spots or omissions were identified and the intended learning outcomes were reinforced.

The Executive Core facilitator of the Strategic Business Challenge and others provided feedback in Module 5 on the content and process of each of the presenters in rehearsal, bringing the detailed tactics and behavioral indicators of executive presence to life.

Coaching Session 8 is designed to both provide a self (or other, mini-360°) evaluation of progress, refinement of the point-forward individual development plan, and closure to the coaching relationship.

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The Individual Development Plan Aligns the Intended Group Learning with the Individual's Specific Developmental Needs For the Focus of the Individual Executive Coaching Sessions

Module 1: Understanding the assumptions and key elements of the business portfolio strategies

Research Trip 2.5 days February

Module 2: Understanding a region / country entry strategy and the requirements of a global perspective.

Module 3: Developing a Talent Pool / Leading Organizational Change

Module 4: Executive Presence and Influence

Module 5: Finalizing the proposed action plan and presenting to senior management.

Coaching Session 2: Debriefing on Self-assessment c/w 360 feedback

Coaching Session 3: Debriefing after Module 1.

Coaching Session 4: Debriefing after Research Trip to: *Reynosa, Tamaulipa Mexico*

Coaching Session 5: Debriefing after Module 2.

Coaching Session 6: Debriefing after Module 3.

Coaching Session 7: Debriefing after Module 4.

Coaching Session 8: Debriefing after Module 8 / *Follow up and evaluation of developmental progress.*

Development of living draft of individual development plan

Development Plan Framed Around the Enterprise Leadership Competency Model Serves as a Focal Point and Baseline for Development

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Conclusion

In Module 5, several career changing events occurred:

- Executives who were more introverted and previously invoked reading off of slides and "death by PowerPoint" culled their presentation deck to just a few key slides and instead spoke slowly and calmly from the heart.

- Participants provided useful preliminary information in private conversations with sponsor and "audience" top executives prior to the presentation to discuss the key proposal points and obtain their understanding and feedback prior to the final proposal presentation. They used an influence strategy to reduce the dynamic of the meeting as a "make or break" presentation.

- One foreign national executive who tended to talk quickly with a thick accent slowed his speech down and annunciated his words for his entire presentation and question and answer period.

- A few participant executives who, in the past, tended to take on the role as "the best and the brightest in the room," appropriately redirected questions from the top executives to other key team members who possessed more expertise on the topic in question.

- Participant presenters were not afraid to respectfully, but confidently, push back on top executive challenges to the proposal's definition of the presenting organizational capability gaps to enter China and the organizational changes that would be necessary in order to close those gaps.

Outcome of the OWL program:

- The essential assessment of the current organizational capability gaps and the changes necessary to close those gaps were accepted, pending the involvement and refinement of other key stakeholders, under the sponsor's oversight.

- The sequence and timing of the changes were the biggest differences between the actions proposed and the actual actions implemented. Otherwise, the essence of the proposal remained intact.

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- A number of the participants were asked to take on additional roles to participate in the leadership of the development of the new capabilities.

- Several participants were promoted within the next 18 months to take on significantly broader enterprise-wide accountabilities. Even during the course of the program, learning had generalized back to their current roles.

Top management considered the ROI of the program to valuable enough to warrant the exploration of:

1. The identification of the next cadre of executives to go through a similar program with a different strategic business challenge; or

2. For "high potential" executives deeper in the organization, how to begin to develop real enterprise-wide competencies without engaging in the full comprehensive OWL program.

For the reader:

1. What is the current need to develop executives with a strong and accurate enterprise-wide understanding, competencies, and credibility in your talent pool?

2. What specific programs or learning interventions are you currently engaged in to develop more executives with these competencies? Are they providing you with the desired talent pool and likely successors?

3. Would you consider having an initial no-obligation exploratory discussion with a senior Executive Core executive development consultant to identify your most likely next steps (without having to immediately reach for a world-class program)?

See:
- www.executive-core.com and find your local regional Executive Core representative.
- Search "Introduction to Executive Core Executive Education" on YouTube.

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About the author:

Dr. Gary Myszkowski has helped senior executives manage rapid change for almost 30 years. He currently serves as an executive coach to high potential executives about to become Vice Presidents, C-Suite executives, and their teams. He specializes in facilitating the transitions of senior executives into new roles, for both external hires and internally promoted incumbents.

Gary also specializes in large group interactive meeting design and facilitation to accelerate organizational change, design and facilitation of business team strategic planning, and shaping organization capabilities for strategy implementation.

In related roles, Gary also serves as faculty and facilitator for customized senior executive development programs and as adjunct faculty for several Executive MBA programs in the US.

Gary has extensive experience both as an external coach and consultant as well as a director-level executive leading an internal consulting group. He was the co-leader of Amoco's global integrated Learning and Organization Effectiveness shared services group and the strategic partner to two presidents of Amoco Chemicals and their executive teams.

Gary has served as a change management consultant to mergers and acquisitions ranging from $50 million to $35 billion. He has been on "both sides of the desk" as a member of due diligence, integration and change management teams—as the acquiring company and a company being acquired.

Prior to Amoco, Gary also served as a Regional Practice Director for Talent Management for a premier global human resources firm, based in their Chicago office. As a part of this role, Dr. Myszkowski conducted over 300 individual psychological assessments of managers and executives for the purposes of selection or development.

Gary earned his Ph.D. and master's degrees at the University of Chicago and his bachelor's degree at Union College. He was a Visiting Scholar to Northwestern's J.L. Kellogg Graduate School of Management. He has also completed advanced training at the Illinois School of Professional Psychology. His clients tend to consider him as a business executive "who happens to be a psychologist." Gary resides near Chicago.

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About Executive Core

- Executive Core maintains a **global network** of 100+ certified coaches / facilitators / consultants who regularly work across the enterprise at all levels and in all lines of business.

- Our professionals have coached more than **7,000 leaders** at critical junctures in their careers while tackling difficult business challenges. Our facilitators have impacted more than 500 companies and touched more than 15,000 employees.

We specialize in providing professional coaching, consulting, and executive learning services:

Executive Coaching

Top Management Team Work

Talent Management Strategy

Executive Education

Action Learning

For more information, contact your primary Executive Core professional, or our CEO:

Barbara Singer Cheng
330.861.6033
barb@executivecore.com
Skype: BarbCheng

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