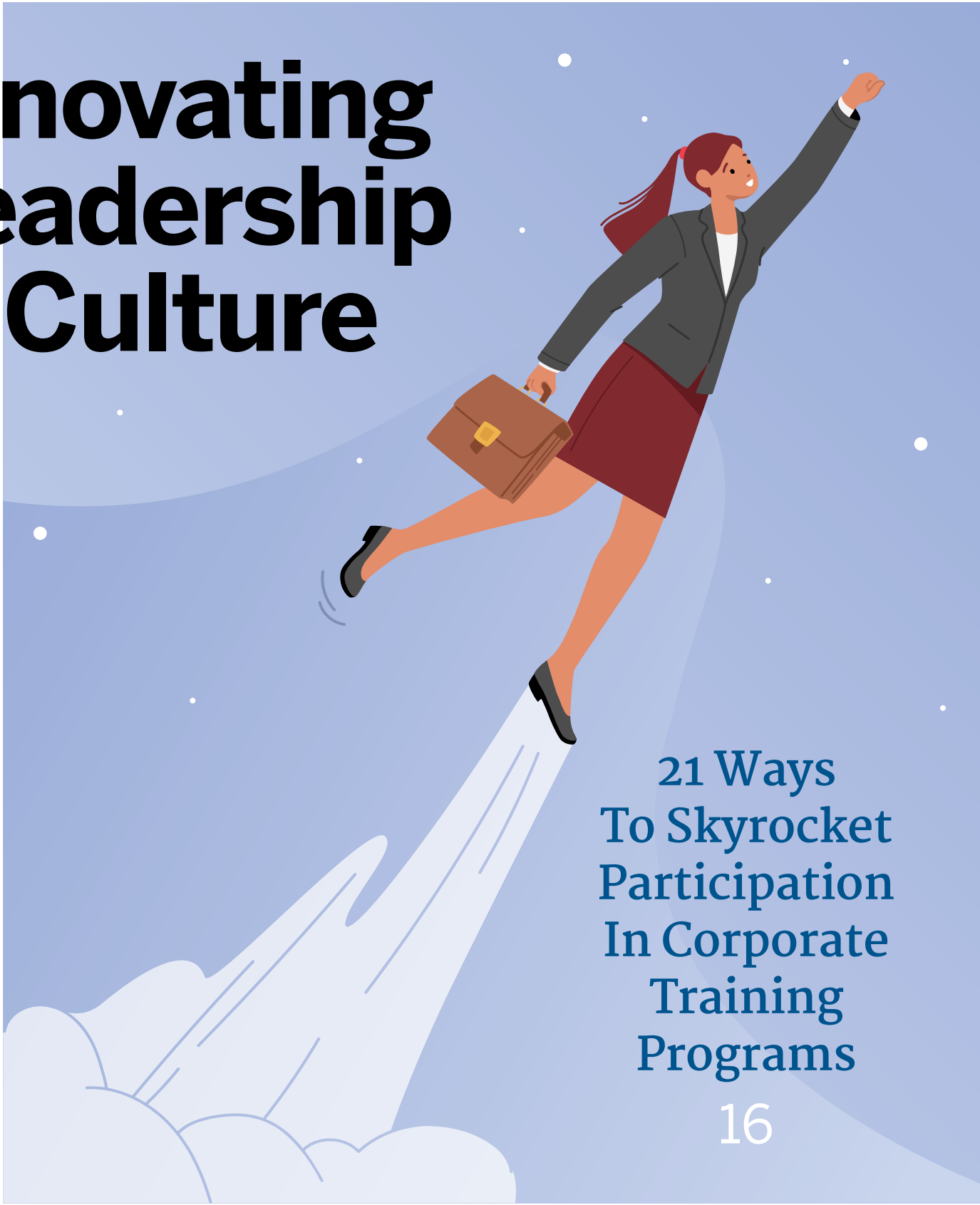


# Innovating Leadership & Culture

#2'2023



## 21 Ways To Skyrocket Participation In Corporate Training Programs

16



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# Drive Behavior Change with Nudges

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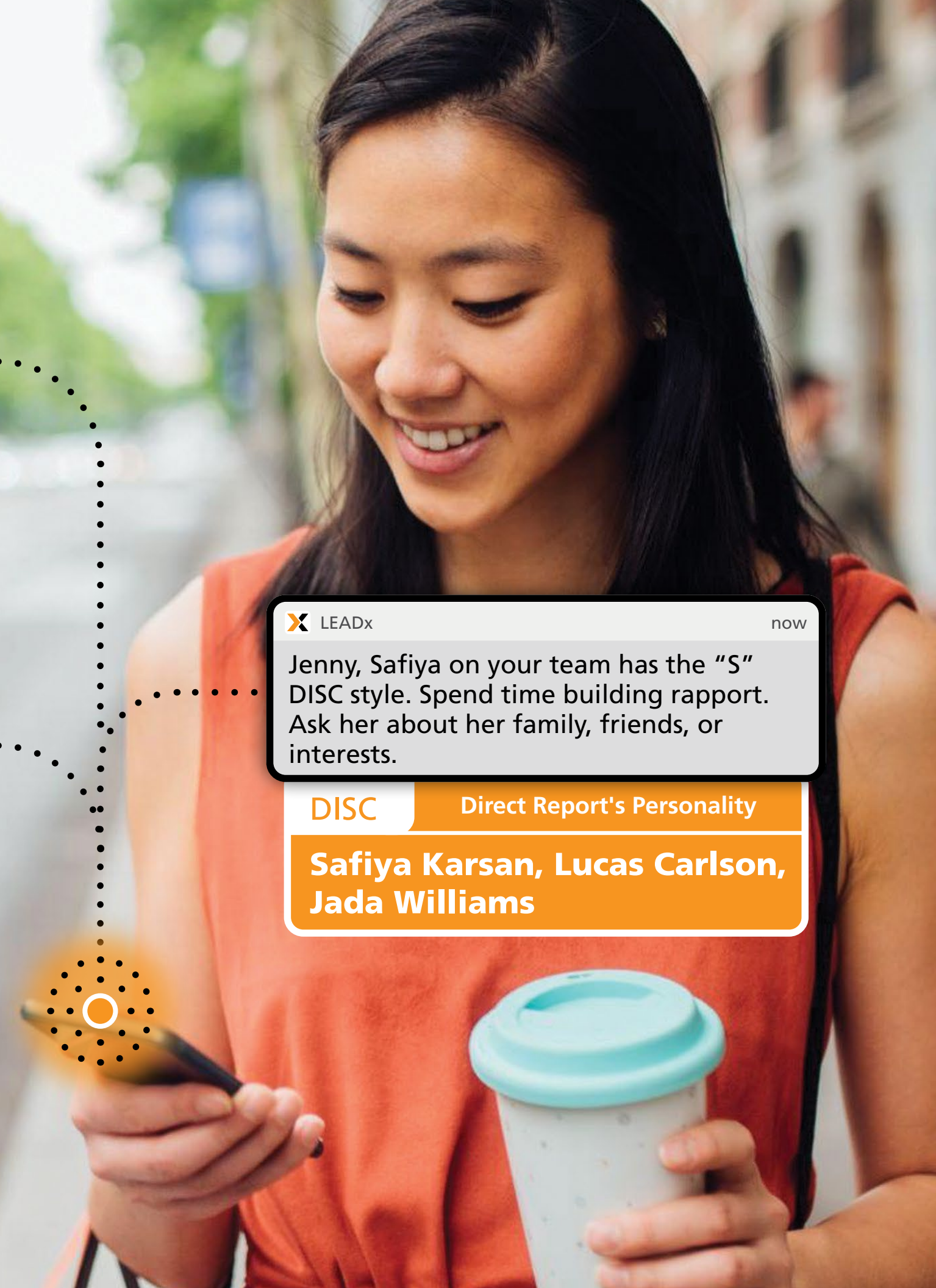
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## LETTER FROM THE EDITOR

# The Top Magazine For Cutting Edge Leadership & Culture Pros



Once again I read one too many articles and reports about the current state of leadership development...The result? I’m sitting at my desk, a fresh coffee in hand, staring off into space and pondering whether leadership development as a whole has what it takes to pull it together. Seriously, I’m feeling a bit sad, a bit overwhelmed. I just read (all in one morning) that:

- 90% of CEOs don’t believe leadership development is having a clear business impact\*
- 60% of leadership development pros don’t believe leadership development should be mandatory (do we not even believe in ourselves?)\*
- And YET, the latest research is also showing that 71% of employees want to leave their jobs (so clearly companies really do need help with leadership development!)\*

To ease my nerves a bit, I started flipping through an early stage draft of this magazine. As I let myself slip into each article, I began to feel a bit of peace. For every nine leadership development professionals who “do it the way we always have,” there’s one who is miles ahead, exploring new topics, new approaches, integrating innovative tech, and very importantly, SHARING their approach.

In this issue, our stack of articles aims to show you the incredible range of possibilities when it comes to leadership and culture and to give you some practical new ideas to start implementing. Here’s a quick sample of what’s in store:

1. Deep dive into 21 case-based strategies to boost learner engagement.

2. Explore how Home Depot built out a system of nudges to scale its wildly successful leadership development program.
3. Absorb the highly original approaches that the chief people officers at Dropbox, Veeva, and HubSpot all take to scale and sustain high-performance cultures.
4. Learn from world-class psychologists, subject matter experts, and coaches: EQ guru Dr. Travis Bradberry breaks down how successful people stay calm, motivation expert and world-class psychologist Dr. Paul Marciano gets into the importance of *being coachable*, and our in-house coaching wizard Kevin Thomas breaks down three key strategies for self-leadership.
5. Uncover key insights from this year’s LinkedIn Learning Report and Leadership Circle’s decades of research on gender and leadership (hint: women outperform men in leadership effectiveness).

Based on the overwhelming positive response to our first edition, this second edition is more than double the size of our first. It also includes our newest section: Learning from the Experts. Hope you enjoy.

Evan Watkins  
Editor

P.S. If you’re a leadership nerd like me, I urge you to flip through the full catalog of LEADx courses in the back of the magazine.

Innovating  
Leadership  
and Culture

LEADx®

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\*“What’s Missing in Leadership Development” McKinsey Quarterly.

\*\*The LEADx 2023 Leadership Development Benchmark Report

\*\*\*HP’s 2023 Workplace Index

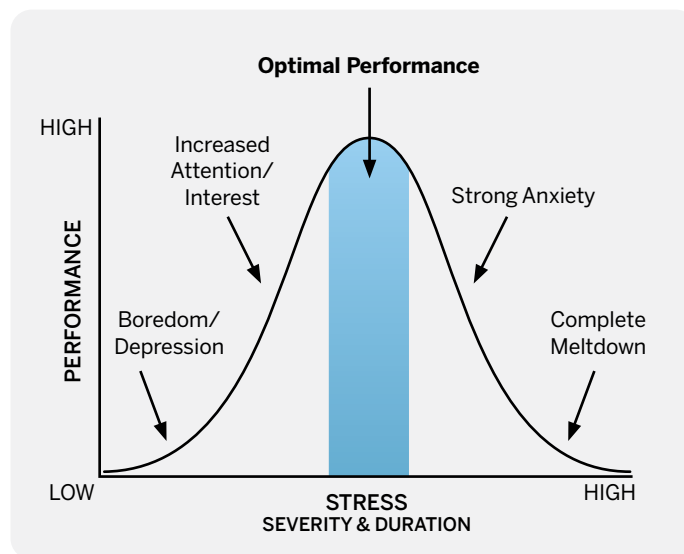
## LEARN FROM THE EXPERTS

# How Successful People Stay Calm

by Dr. Travis Bradberry

**The ability to manage your emotions and remain calm under pressure has a direct link to your performance. I've conducted research with more than a million people and found that 90% of top performers are skilled at managing their emotions in times of stress in order to remain calm and in control.**

If you follow my work, you've read some startling research summaries that explore the havoc stress can wreak on one's physical and mental health (such as the Yale study, which found that prolonged stress causes degeneration in the area of the brain responsible for self-control). The tricky thing about stress (and the anxiety that comes with it) is that it's an absolutely necessary emotion. Our brains are wired such that it's difficult to take action until we feel at least some level of this emotional state. In fact, performance peaks under the heightened activation that comes with moderate levels of stress. As long as the stress isn't prolonged, it's harmless.



Research from the University of California, Berkeley, reveals an upside to experiencing moderate levels of stress. But it also reinforces how important it is to keep stress under control. The study, led by post-doctoral fellow Elizabeth Kirby, found that the onset of stress entices the brain into growing new cells responsible for improved memory. However, this effect is only seen when stress is intermittent. As soon as the stress continues beyond a few moments into a prolonged state, it suppresses the brain's ability to develop new cells.

"I think intermittent stressful events are probably what keeps the brain more alert, and you perform better when you are alert," Kirby says. For animals, intermittent stress is the bulk of what they experience, in the form of physical threats in their immediate environment. Long ago, this was also the case for humans. As the human brain evolved and increased in complexity, we've developed the ability to worry and persevere on events, which creates frequent experiences of prolonged stress.

Besides increasing your risk of heart disease, depression, and obesity, stress decreases your cognitive performance. Fortunately, though, unless a lion is chasing you, the bulk of your stress is subjective and under your control. Top performers have well-honed coping strategies that they employ under stressful circumstances. This lowers their stress levels regardless of what's happening in their environment, ensuring that the stress they experience is intermittent and not prolonged.

While I've run across numerous effective strategies that successful people employ when faced with stress, what follows are ten of the best. Some of these strategies may seem obvious, but the real challenge lies in recognizing when you need to use them and having the wherewithal to actually do so in spite of your stress.

## They Appreciate What They Have

Taking time to contemplate what you're grateful for isn't merely the "right" thing to do. It also improves your mood, because it reduces the stress hormone cortisol by 23%. Research conducted at the University of California, Davis found that people who worked daily to cultivate an attitude of gratitude experienced improved mood, energy, and physical well-being. It's likely that lower levels of cortisol played a major role in this.

## They Avoid Asking "What If?"

"What if?" statements throw fuel on the fire of stress and worry. Things can go in a million different directions, and the more time you spend worrying about the possibilities, the less time you'll spend focusing on taking action that will calm you down and keep your stress under control. Calm people know that asking "what if?" will only take them to a place they don't want—or need—to go.

## They Stay Positive

Positive thoughts help make stress intermittent by focusing your brain's attention onto something that is completely stress-free. You have to give your wandering brain a little help by consciously selecting something positive to think about. Any positive thought will do to refocus your attention. When things are going well, and your mood is good, this is relatively easy. When things are going poorly, and your mind is flooded with negative thoughts, this can be a challenge. In these moments, think about your day and identify one positive thing that happened, no matter how small. If you can't think of something from the current day, reflect on the previous day or even the previous week. Or perhaps you're looking forward to an exciting event that you can focus your attention on. The point here is that you must have something positive that you're ready to shift your attention to when your thoughts turn negative.

## They Disconnect

Given the importance of keeping stress intermittent, it's easy to see how taking regular time off the grid can help keep your stress under control. When you make yourself available to your work 24/7, you expose yourself to a constant barrage of stressors. Forcing yourself offline and even—gulp!—turning off your phone gives your body a break from a constant source of stress. Studies have shown that something as simple as an email break can lower stress levels.

Technology enables constant communication and the expectation that you should be available 24/7. It is extremely difficult to enjoy a stress-free moment outside of work when an email that will change your train of thought and get you thinking about work can drop onto your phone at any moment. If detaching yourself from work-related communication on weekday evenings is too big a challenge, then how about the weekend? Choose blocks of time where you cut the cord and go offline. You'll be amazed at how refreshing these breaks are and how they reduce stress by putting a mental recharge into your weekly schedule. If you're worried about the negative repercussions of taking this step, first try doing it at times when you're unlikely to be contacted—maybe Sunday morning. As you grow more comfortable with it, and as your coworkers begin to accept the time you spend offline, gradually expand the amount of time you spend away from technology.

## They Limit Their Caffeine Intake

Drinking caffeine triggers the release of adrenaline. Adrenaline is the source of the "fight-or-flight" response, a survival mechanism that forces you to stand up and fight or run for the hills when faced with a threat. The fight-or-flight mechanism sidesteps rational thinking in favor of a faster response. This is great when a bear is chasing you, but not so great when you're responding to a curt email. When caffeine puts your brain and body into this hyperaroused state of stress, your emotions overrun your behavior. The stress that caffeine creates is far from intermittent, as its long half-life ensures that it takes its sweet time working its way out of your body.

## They Sleep

I've beaten this one to death over the years and can't say enough about the importance of sleep to increasing your emotional intelligence and managing your stress levels. When you sleep, your brain literally recharges, shuffling through the day's memories and storing or discarding them (which causes dreams), so that you wake up alert and clear-headed. Your self-control, attention, and memory are all reduced when you don't get enough—or the right kind—of sleep. Sleep deprivation raises stress hormone levels on its own, even without a stressor present. Stressful projects often make you feel as if you have no time to sleep, but taking the time to get a decent night's sleep is often the one thing keeping you from getting things under control.

## They Squash Negative Self-Talk

A big step in managing stress involves stopping negative self-talk in its tracks. The more you ruminate on negative thoughts, the more power you give them. Most of our negative thoughts are just that—thoughts, not facts. When you find yourself believing the negative and pessimistic things your inner voice says, it's time to stop and write them down. Literally stop what you're doing and write down what you're thinking. Once you've taken a moment to slow down the negative momentum of your thoughts, you will be more rational and clear-headed in evaluating their veracity.

You can bet that your statements aren't true any time you use words like “never,” “worst,” “ever,” etc. If your statements still look like facts once they're on paper, take them to a friend or colleague you trust and see if he or she agrees with you. Then the truth will surely come out. When it feels like something always or never happens, this is just your brain's natural threat tendency inflating the perceived frequency or severity of an event. Identifying and labeling your thoughts as thoughts by separating them from the facts will help you escape the cycle of negativity and move toward a positive new outlook.

## They Reframe Their Perspective

Stress and worry are fueled by our own skewed perception of events. It's easy to think that unrealistic deadlines, unforgiving bosses, and out-of-control traffic are the reasons we're so stressed all the time. You can't control your circumstances, but you can control how you respond to them. So before you spend too much time dwelling on something, take a minute to put the situation in perspective. If you aren't sure when you need to do this, try looking for clues that your anxiety may not be proportional to the stressor. If you're thinking in broad, sweeping statements such as “Everything is going wrong” or “Nothing will work out,” then you need to reframe the situation. A great way to correct this unproductive thought pattern is to list the specific things that actually are going wrong or not working out. Most likely you will come up with just some things—not everything—and the scope of these stressors will look much more limited than it initially appeared.

## They Breathe

The easiest way to make stress intermittent lies in something that you have to do every day anyway: breathing. The practice of being in the moment with your breathing will begin to train your brain to focus solely on the task at hand and get the

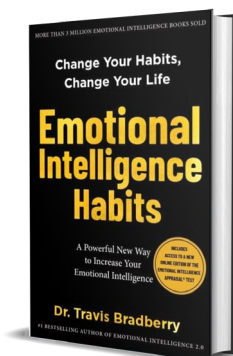
stress monkey off your back. When you're feeling stressed, take a couple of minutes to focus on your breathing. Close the door, put away all other distractions, and just sit in a chair and breathe. The goal is to spend the entire time focused only on your breathing, which will prevent your mind from wandering. Think about how it feels to breathe in and out. This sounds simple, but it's hard to do for more than a minute or two. It's all right if you get sidetracked by another thought; this is sure to happen at the beginning, and you just need to bring your focus back to your breathing. If staying focused on your breathing proves to be a real struggle, try counting each breath in and out until you get to 20, and then start again from 1. Don't worry if you lose count; you can always just start over.

This task may seem too easy or even a little silly, but you'll be surprised by how calm you feel afterward and how much easier it is to let go of distracting thoughts that otherwise seem to have lodged permanently inside your brain.

## They Use Their Support System

It's tempting, yet entirely ineffective, to attempt tackling everything by yourself. To be calm and productive, you need to recognize your weaknesses and ask for help when you need it. This means tapping into your support system when a situation is challenging enough for you to feel overwhelmed. Everyone has someone at work and/or outside work who is on their team, rooting for them, and ready to help them get the best from a difficult situation. Identify these individuals in your life and make an effort to seek their insight and assistance when you need it. Something as simple as talking about your worries will provide an outlet for your anxiety and stress and supply you with a new perspective on the situation. Most of the time, other people can see a solution that you can't because they are not as emotionally invested in the situation. Asking for help will mitigate your stress and strengthen your relationships with those you rely upon. ■

**Dr. Travis Bradberry** is the Chief People Scientist at LEADx. His new book *Emotional Intelligence Habits* offers an abundance of practical strategies that will teach you how to form good habits, break bad ones, and master the micro behaviors that will take your EQ to new heights.



# Three Critical Strategies To Help Your Leaders Adopt A Coach Approach

by Kevin Thomas

**T**raditional leadership development programs for front-line managers have focused on offering knowledgeable insights, providing step-by-step models and frameworks to use on the job, and strengthening skills. All helpful to support a front-line leader's development. So shouldn't L&D professionals use this same strategy to help these leaders learn to take a coach approach with their direct reports?

Yes...AND, coaching is more than a skill. Coaching is also a mindset and, in turn, a way of being.

A leader can learn coaching skills and models and practice them repeatedly with her direct reports to strengthen her skills. But, in order to truly master these skills, she must practice and embrace them with herself first.

Developing a coaching mindset requires willingness, awareness, curiosity, and intentional habits. By adopting the three strategies outlined in this article, L&D professionals can empower first-line managers to cultivate the essential coaching mindset. Remember, a coach approach isn't just about behavior, it's about who you are as a leader. It's a journey of self-discovery and continuous growth that ultimately leads to more an effective leadership style and stronger more empowered teams.

## Strategy #1: Master Your Self-Talk with Saboteur Awareness and Powerful Questions

Developing a coaching mindset starts with becoming aware of your thoughts and the types of thoughts you have. By doing this, you can discover your “Saboteurs.” Saboteurs can also be referred to as your “Inner Critic.” Saboteurs are the voices in your head that generate negative emotions as you go about your day. Do you find yourself trying to please everyone, trying to control everything, constantly worried about what could go wrong, or avoiding work up until the last minute? Left unchecked, these saboteurs cause constant stress, poor decision-making, and eventually burnout. This not only impacts the way you lead yourself but also your natural leadership style and how you treat others.

To interrupt these saboteurs, ask powerful questions. A powerful question is one that is open-ended and empowers you to make a conscious choice about the direction you will take moving forward. “What do I need right now?” “How are my thoughts serving me right now?” “What other perspective could I take in this situation?” are all great examples of powerful self-coaching questions. By identifying saboteurs and asking powerful questions, you can begin to shift your natural thinking style to match that of a coach's mindset.

**“Stay ready so you don't have to get ready.”**

### Strategy #2: Regular Reflection in a “Judge-free” Zone

In today's fast-paced world, personal and professional growth can easily take a back seat to busy schedules and demanding lifestyles. Not to mention, as a leader, your focus is typically on supporting your team members and being a great leader. Unfortunately, this makes it easy to neglect to ask yourself: “How am I leading myself?” Just as leading others effectively is made up of communication and behaviors, so is self-leadership.

One of the most important strategies to leading one's self effectively comes through self-reflection, a practice that allows us to gain deeper insights into our experiences, decisions, and behaviors. Examples of self-reflection include journaling, meditating, and conducting a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis on yourself.

Essential to self-reflection is a “judge-free” zone. In a judge-free zone, you can reflect through a lens of observation and curiosity. This makes self-reflection more effective and enjoyable. For instance, I recently observed the impacts of self-reflection and a judge-free zone throughout a group coaching engagement. After a few sessions, managers began to speak differently when they shared. They said, “I'm noticing that when I...” This demonstrates that they are successfully stepping into a judge-free zone to observe their behavior. This is a sure sign of an internal shift toward a coach's mindset.

“How you lead yourself will influence how you lead others.”

### Strategy #3: Plan the Work, Work the Plan

Ok, let's call it out: I'm calling this strategy three, but there are really four strategies mentioned so far: identify saboteurs, ask powerful questions, practice self-reflection exercises, and create a judge-free zone. That's why this final strategy focuses primarily on execution: plan the work, work the plan. Spend 5% of your time creating a plan (choosing which self-reflection exercise you'll commit to daily, how you'll hold yourself accountable, and reminders to keep yourself focused) and 95% of your time executing your plan.

You can be provided with tools and frameworks to take a coach approach, but without a good plan, you will revert back to old strategies over time and when under stress. To lead authentically and effectively with a coaching mindset, you must realize and accept that each of the strategies above are like a muscle. The more you exercise that muscle, the more results you will see come to fruition.

“The juice is worth the squeeze.”

### Adopt a Coach Mindset One Step at a Time

Transformation occurs from the inside out. It takes time and intentional action. Nurturing a coaching mindset is a marathon, not a sprint. It is a lifestyle, not a diet trend. To do this, leaders must put in the work mentioned throughout this article. Create self-reflection habits to kick off the first 10 minutes of the work day. Practice recognizing the situations in which saboteurs appear and interrupting them with powerful questions. Plan the work, and work the plan. ■

**Kevin Thomas** is the Head of OD at LEADx. He's an ex-Google OD practitioner, consultant, and certified ICF leadership coach. He's certified in SLII® and popular 360 assessments such as the Leadership Practices Inventory and Leadership Circle Profile.

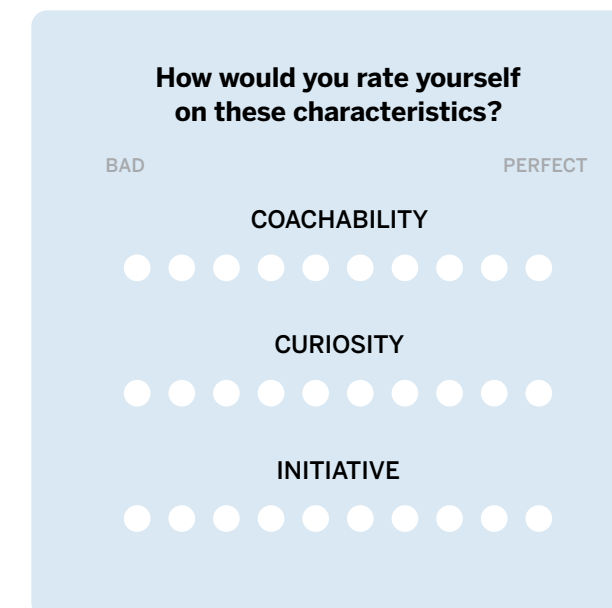
# “Coach, what can I have done better?” On the Competitive Edge of Coachability

by Dr. Paul Marciano

**M**y niece, Stella, is amazing. Truly. Last year at her 7th grade graduation she won all 4 academic awards. She is a savant at the piano and captain of her basketball, softball, and flag football teams. However, Stella's superpower and the reason she will be successful at anything she decides to take on in life is her “coachability.” After a softball game where she was the winning pitcher, I watched her go up to her coach and ask: “Coach, what can I have done better?”

While working at a client site recently, I happened to speak with a new hire, a young man with little formal education or work experience. When I asked how he got the job, he shared that he had found the position online and completed the application. However, he decided that instead of submitting it electronically, he would drive it to the company. And instead of leaving it with the receptionist, he asked if he could hand it to the HR manager, who was in fact available and agreed to meet with him. As she looked over his application which was clearly “sub-par” relative to the job description, she asked: “Why should I hire you?” To which he responded: “Because I am coachable.”

In my 35 years in the field of training and development, I can tell you that the people who experience the most success in business and life display the following 3 characteristics: Coachability, Curiosity, and Initiative. These are the people who wonder about how things are done and why, and how they can be improved upon; the people who proactively seek and act upon opportunities to improve themselves, their work, and the organization; and, the people who are willing to be vulnerable and seek out critical feedback and coaching.



As a manager, leader, and even as a parent, it is so very important to serve as a model for these traits and their associated behaviors. To be certain, people differ considerably in terms of personality and aptitude when it comes to these characteristics. Critically, they can be improved upon. Yes, “coachability” can, in most cases, be coached. (To be certain, there are rare people who are so obstinate and narcissistic that coaching simply isn’t going to make a difference.)

When it comes to coaching coachability, I am an enormous fan of beginning with a 360-degree assessment which can reveal blind spots that may limit and derail a career. A 360 also serves to identify and reinforce an individual’s strengths, which may also be a blind spot! By the way, I strongly suggest creating a customized behaviorally-based assessment and pairing it with a personality assessment. I personally use a list of over 125 behaviors from which clients choose a subset of 30–35. (I am happy to share this list, simply email me at the address in my bio.)

During the 360 debrief, I emphasize the importance of remaining curious. It becomes evident pretty quickly who is going to be a good candidate for coaching! Perhaps the most important part of the 360 process is to instruct individuals on the post-assessment conversations. As we debrief, we identify particular areas of concern and then select a cross-section of raters from which to receive additional 1:1 feedback. The coachee is instructed to meet with raters, during which time they are to ask questions, listen, paraphrase, and say “thank you.” Most importantly, the coachee asks the raters for their ongoing support. For example, “Mary, I really appreciate your time today and your feedback has really been helpful. I want you

to know that I am committed to being more patient with people and making sure they have the opportunity to be heard. I realize that I have been pretty inconsiderate and disrespectful toward some folks. I would very much appreciate your calling me out and holding me accountable should you see me being impatient with people. Would you be willing to do that?” Rarely do people say no to this request. I promise you, people who successfully recruit others to hold them accountable experience far greater success than those who do not. You create your own in-house accountability team, which gives you in-the-moment, tangible, actionable, feedback.

Why do so many people resist coaching? I think it is discomfort with vulnerability and fear of “looking bad” in front of others, especially if that person is one’s boss. Of course, I view coachability as a sign of confidence and ambition. And in my experience, the best managers view coachability the same way. So, if you want to continue to grow in your career, and you haven’t already done so, demonstrate curiosity and initiative and ask for a 360-degree assessment and coaching. ■

**Dr. Paul Marciano**, author of the McGraw-Hill best-selling business book *Carrots and Sticks Don’t Work: Build a Culture of Employee Engagement with the Principles of RESPECT™* and *Let’s Talk About It: Turning Confrontation into Collaboration at Work*.

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# Why You Need To Make The Shift To Skills-Based Training (And How To Do So)

by Karl Kapp

**A**lbert Einstein has been rumored to have said, “We cannot solve our problems with the same thinking we used to create them.” This has never been truer than in today’s organizations. Employees are constantly asked to learn new information and gain new knowledge to perform their jobs. The tools, machinery, and software programs employees use continue to grow in sophistication and complexity, from automated weld assemblies to artificial intelligence writing legal briefs and manufacturers using robots. With the rapid rate of growth in tools and technology, learning and development (L&D) will not keep up if it doesn’t change its thinking and its approach.

In addition to jobs becoming more sophisticated, the need to think critically, negotiate, problem-solve, and communicate effectively has grown. On top of that, the number of channels in which communication occurs has risen dramatically. As a result, the demand for well-trained, thoughtful, caring, and even-handed employees, managers, and leaders is higher than ever.

Despite the increased sophistication and complexity of work, organizations tend to stick to the same outdated approach and methods. The old paradigm of teaching to impart knowledge or to provide step-by-step, task-based, didactic instructions still persists. What is needed instead is an approach that focuses on teaching skills that are flexible, adaptable, and transferable to many tasks. Organizations and consultancies frame this as “a skills-first approach to talent management.”

## What Is Skills-Based Training?

An article published by the World Economic Forum defines a skills-first approach as “a new approach to talent management that emphasizes a person’s skills and competencies—rather than degrees, job histories or job titles—with regard to attracting, hiring, developing, and redeploying talent.” What follows are three essential components of skills-based training:

- 1. Doing** — Whether you call this approach “skills-first” or “skills-based,” one thing is clear: It is not about knowledge or competencies, it’s about doing. Skills-based goes well beyond knowledge. Yes, to perform a skill, you need a base of knowledge and an understanding of the concepts behind the skill you want employees to perform. You can’t ignore knowledge, but you certainly can’t stop there either.
- 2. Successful On-the-Job Application** — A key factor to a skills approach is the ability of the employee to apply the skill. The skill might be “coaching” or “troubleshooting a piece of high-tech equipment.” To demonstrate mastery of a skill, the person can’t just tell you about it, they must be able to apply knowledge in a manner that brings results. This requires practice.
- 3. Application across a Variety of Settings** — A skills-based approach is also grounded in the idea that you can transfer or apply a skill in different settings. Employees need to have many different opportunities to transfer newly learned skills across various situations. A critical strategy for learning to apply skills across different contexts is reflection. Reflection on application helps employees generalize and strategize the use of their skills.

A skills-based approach is powerful because each skill can be transferred across many different situations. Mastering critical skills will empower learners to apply those skills in various situations, making them flexible and effective in many different environments.

### Three Steps to Create a Skills-Based Culture at the Organizational Level

Creating a skills-first culture and approach at the organizational level requires three overarching steps.

**STEP 1:** The organization must realize that both hard and soft skills (sometimes called power skills) are necessary and critical for future success. Hard skills involve objective, quantifiable, specific, and measurable skills such as programming or running a piece of equipment. Power skills are human-centered skills, like communication, social and emotional intelligence, critical thinking, and problem-solving.

**STEP 2:** Create a matrix of the skills needed across the organization and for specific job categories. Once this is accomplished, look to the future to determine what skills the organization might need down the line. Look at immediate, mid-term, and long-term strategic goals and plans to make that happen.

**STEP 3:** Once the types of skills are identified and the appropriate matrices created, choose the acquisition approach for that skill. Here are a few examples of what this might look like:

- You change your hiring process to include a skills-based assessment. This way, you can hire for skills, not degrees.
- You roll out an internal training process that builds and reinforces necessary skills.
- You bring in temporary assistance to fill existing skills gaps.

### Putting It All Together

A skills-first approach is not a “nice to have” in today’s rapidly changing competitive landscape, it’s a need to have. It’s also a great way to stand out and obtain a competitive advantage. Ensure your organization has the skills and talent it needs to thrive in the future. ■

**Karl Kapp, Ed.D.** is a full professor of instructional design and technology at Commonwealth University in Bloomsburg, PA and author of ten books on the convergence of learning, technology, and business. He is a TEDx speaker, provides keynote addresses, and frequently consults with organizational leaders about best practices and approaches for organizational talent management.

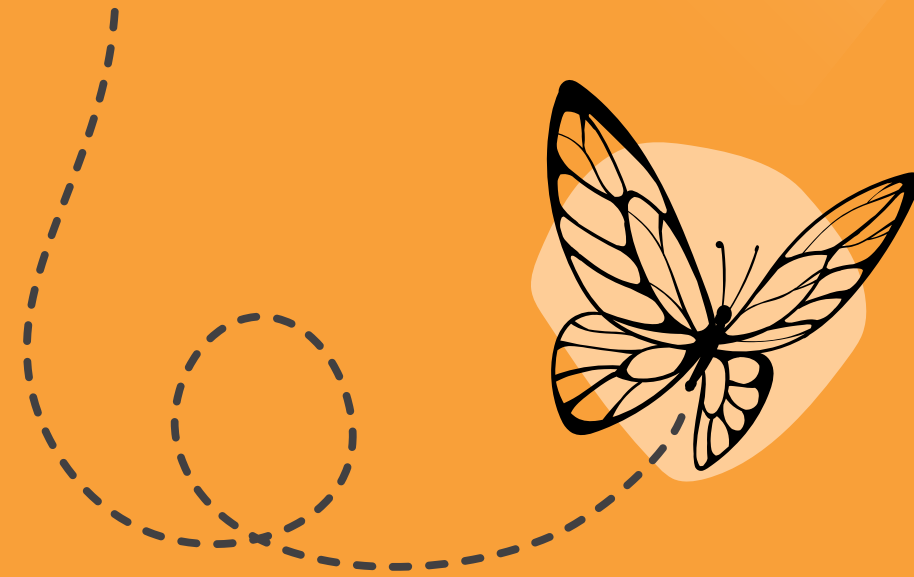
He recently created a LinkedIn Learning course titled “Increasing Learner Engagement: A Skills-First Approach.” See a list of all Karl’s LinkedIn Learning courses here ..... He is also author of a YouTube channel providing tips and techniques for Learning Leaders. You can access the channel here .....



# LEADx

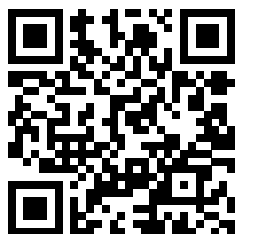
## Help your managers evolve into master coaches.

Imagine if all of your managers became master coaches. Partner with LEADx to increase coaching conversations by 35%, then sit back and watch as your team performance takes flight.



Want to know the secret to increasing coaching conversations by 35%? It’s practice. Not the sexiest answer, but it’s true. Our platform enables your leaders to practice what they learned on-the-job in quick, punchy bursts. We leverage:

- **Nudges:** Backed by behavioral science and powered by tasteful AI, our nudges deliver personalized strategies and exercises for leaders to apply on the job.
- **World-class virtual training:** Workshops and group coaching make our experts affordable all the way down to the frontline.
- **Microlearning:** If you’re going to make busy leaders learn, you better:
  - 1) get it the heck out of dusty, windowless classrooms,
  - 2) deliver that learning in the flow of work, and
  - 3) make it available on-demand (an open book test).



Get A Free Demo Of LEADx





# 21 Ways To Skyrocket Participation In Corporate Training Programs

by Gary DeNardo and Evan Watkins

**“We want growth and development,” most employees say. “We’re too busy to attend your training program or to take the online learning,” they also say.**

**We spoke to over one hundred heads of leadership development, and the common challenge is getting busy, overwhelmed employees to actually sign-up, show up, and participate in learning and development (L&D) offerings.**

**Based on psychological principles of persuasion and behavior change, here are twenty-one ways L&D professionals can maximize attendance and engagement.**

## 1 Gain Manager Support

Nothing will drive engagement and motivation like having a manager who genuinely cares about your training and personal development. Adobe Director of D&I Talent Development, Angela Szymusiak, runs a Women in Leadership program with an impressive 34% promotion rate into Director-level and above positions. After a decade of running and improving this program, Szymusiak found that “increasing interaction with managers” was her most impactful adjustment. Here are three specific ways she increases manager involvement:

*She gives her high-potential leaders specific questions to bring up in their one-on-ones. For example:*

- "I'd like to learn your best practices on how you do \_\_\_\_."
- "Is there somebody you think who's good at this that you could introduce me to?"
- "Is there feedback you can give me as I apply this new concept?"

*She meets monthly with her learners' managers. She fills the managers in on what's happening and how they can best support their employees through the Women in Leadership program. If meeting with your participants' managers isn't realistic, or if you want to bolster that meeting with something physical, use a Pull Through Guide. A Pull Through Guide houses checklist items and critical topics in one clean*

place for busy managers. Managers can check with the sheet to help participants ground their learnings on the job.

She facilitates an end-of-program, three-way meeting between the high-potential leader, their manager, and their executive coach. The participant shares vital learnings, how they want to continue growing, and how their manager can sustainably support them.

## 2 Award Digital Credentials for Full Engagement with Your Program

Digital credentials (i.e., badges and certifications) offer tangible value to learners. Like a degree, learners carry their credentials forever as proof of what they learned.

Digital credentials can serve as a map of ideal engagement with your program. You can specify your own badge criteria by program. For example, to earn a completion badge, learners might be required to:

- complete a self-paced video course
- attend four live group coaching sessions in four months
- complete one micro-mission (i.e., micro action) a week for 8 weeks
- complete an end-of-session reflection

At Grant Thornton, learners could choose between Badge-Earner and No-Badge. To earn a badge, participants had to complete an extensive set of criteria, including components like on-the-job practice, discussions, cohort work, and self-paced learning. The year after the training program, Badge-Earners outperformed Non-Badge-Earners across their top three performance metrics:

- Total billable hours (+1.1%)
- Managed Revenue (+18%)
- Leadership Impact Index (+2%)

## 3 Use the 3-to-1 Model To Focus On Real World Application

Communicate the value of your program by making on-the-job application exercises a significant part of your program (if not the majority). The 3-to-1 model is a powerful way to ensure on-the-job application gets its due attention. Here's how it works: For each formal learning, design and deliver three on-the-job application exercises.

For example, let's say you want your managers to give more effective feedback. Your "curriculum" would become an action learning journey:

- Week 1: Live workshop to learn and practice a feedback framework. For example, a facilitator could teach the B.I.G. model of feedback (Behavior, Impact, Get Agreement).
- Week 2: Participants would ask their team members for feedback (supporting materials could include model emails, discussion guides, and a job aid on how to receive feedback)
- Week 3: Participants would give their team members feedback — but only positive feedback.
- Week 4: Participants would give constructive feedback as appropriate. If they see something, they'll say something.

Rather than "suggesting" these application activities during weeks two through four, you treat this time as more important than week one. Participants:

- ask for feedback activities to be scheduled
- ask to be cc'd on email communications related to the activities
- require participants to fill out reflection worksheets (what went well, what didn't, what questions do they have about what happened)
- hold follow-up coaching conversations

Here's an example of the 3-to-1 model laid out over six months for Emerging Leaders.



## 4 Deliver Personalized Nudges

Nudges engage learners by delivering bite-size, personalized, and applicable information. A good nudge concisely reinforces essential information. A great nudge will offer a strategy to apply based on a learner's assessment results or target behaviors.

For example, a manager, "Jenny" receives two nudges. The first nudge helps Jenny practice applying her Positivity strength. The second nudge reminds her of her team member's Activator strength and how Jenny should help leverage that strength as a manager.

## 5 Share Testimonials from Successful Alums

Testimonials provide social evidence of your program's value, grounding it in positive, relatable outcomes. It can be helpful to think of alum testimonials as falling into two types:

- **Short:** Your goal is to show a relevant title and an impressive result. One sentence loaded with tangible results can work wonders to engage your learners.
- **Long:** Your goal here is to show a story. The testimonial should describe how a learner used to be and

used to behave, then break down what they learned and how it helped them improve.

In either case, avoid vague, positive language and unnecessary rambling. Try to get testimonials that are as clear and concise as possible.

Here's a case example of a *long* testimonial:

*Our Women in Leadership Program helped me connect to my authentic self, find my unique voice, and communicate my value. I was promoted to Director level within one year of this program. By actively participating in this program, I am now part of a community of smart, passionate women for years to come.*  
— Director of Product Development

Here's a case example of a *short* testimonial:

*After working through this program, my team's engagement scores increased by seven points.*  
— Manager of Customer Support

## 6 Follow Up with Participants Individually

Reaching out to participants who no-show or seem to be falling behind can be a highly effective engagement tactic, although also time-consuming. Consider your program, your audience, and how you approach your follow-up. A reminder of the benefits of the program and sincere offers of help can go a long way to getting them back on track. If participants are in a nomination-based program, they can be reminded that they took a slot that many others were fighting for.

## 7 Deliver Micro-Learning in the Flow of Work

If employees claim they are “too busy” to attend your workshops or to complete multi-hour eLearning programs, change the delivery to bite-size modules delivered in the flow of work.

At Sam’s Club, store Associates spend all their hours on the floor in front of customers. Instead of pulling Associates off the floor for days-long training sessions, they delivered micro-learning on handheld devices. Since Associates use their phones to do their job (i.e., check inventory and availability of products), incorporating micro-learning into their workflow was natural and highly effective. Plus, with the content available on their phones, Associates could pull up learning on-demand to recall valuable strategies and ideas.

## 8 Design and Launch an Ongoing Communication Campaign

Your goal with internal communication and marketing is to be clear, quick, and concise. Don’t just deliver a stream of pesky reminders that your participants inevitably tune out. Instead:

- Communicate on a platform your learners use regularly (Slack, MS Teams, etc.).
- Be clear and concise.
- Communicate consistently but prudently (you don’t want communications to become noise).
- Be creative. For example, you might deliver relevant metrics about how “learners who excel at this skill see a 20% increase in engagement from their teams.” Or, you might have senior leaders record a video on the importance of your training.

*The Gold Standard for Internal Communication:* Your internal communication helps spark peer learning. Your participants respond to “drips,” discuss challenges, and share their experiences.

*The Platinum Standard for Internal Communication:* Your internal communication network becomes a platform and community for ongoing learning. Alums continue to participate and practice your monthly topics (and sometimes those topics become especially relevant to them at a specific moment). Learners and alums discuss ideas and strategies, share experiences, and establish a long-term support network.

## 9 For Professional Services Audiences: Make Training Billable

Since many professional services employees bill their hours, they can be a challenging audience to engage. Each hour of training can feel to them as though it’s at direct odds with their performance.

Duck Creek Technologies had a simple yet brilliant solution: They worked with their CEO to make it so professional services employees could record up to three hours of training per week as billable.

## 10 Add Monthly or Quarterly Coaching to Your Program as “Checkpoints” in the Learning Journey

Coaching helps establish engaging checkpoints throughout your learners’ journeys. If learners know they have a monthly or quarterly coaching session around what they’re learning, they’ll be much more likely to complete work between sessions.

As a bonus, monthly coaching (one-on-one or group) also gives learners an opportunity to talk through challenges they face as they apply what they learned. This helps bridge the gap between “ideas” and “practicality.” Group coaching, which is the most cost-effective way to add coaching, also has the added benefit of building a peer network and letting learners hear about each other’s challenges and learnings.

## 11 Use Metrics: Test, Re-Test, and Pulse in Between

Measuring your leaders’ performance before training shows them exactly where they stand to improve. Measurement midway through training helps show leaders their progress (or lack thereof). And measurement at the end of the program adds an objective form of accountability.

For example, a CAT Scan (Cultural Analysis of a Team) survey shows leaders how their team is doing in terms of team culture and engagement. When your leader sees specific areas for improvement, they feel more engaged and motivated to improve on those behaviors. They see a metric tied to a particular behavior they need to impact. A test-retest process can also work well with an engagement survey, 360 assessment, or even a self-assessment.

For more consistent measurement throughout your program, use pulse surveys to check progress. For example, if your leader’s goal is to have more effective one-on-one meetings, you can pulse their direct reports halfway through the program to ask, “Have you had a good conversation with your manager in the last two weeks?”

Metrics are a more objective form of accountability that helps remind leaders of the purpose of training. Metrics help leaders put a number on their improvement.

## 12 Assign Senior Learning Champions or Mentors

Champions and mentors help ground your training in reality and signal its importance.

Champions are senior leaders who go through the training program alongside learners. Champions chime in with stories and examples of how they have applied learnings on the job.

Similarly, you can pair senior leaders with your learners to have monthly or quarterly mentorship meetings. In these meetings, senior leaders act as mentors. Mentors ask learners about critical skills and behaviors, and then mentors share examples of how they apply those skills on the job.

## 13 Involve Your CEO and C-Level

Senior executive advocacy signals your program’s value. Five minutes of a senior executive’s time can create an outsized impact. Try to ask your CEO or executive to:

- Kick off your program with a five-minute speech.
- Record a video emphasizing the value of your training to send out to learners.
- Check on training program progress with other leaders during weekly meetings.

The idea is to ask for something that takes minimal time but helps you a lot.

If you have substantial senior buy-in already, you might ask for deeper involvement. At Keysight Technologies, for example, their CEO holds a yearly meeting where top company leaders discuss company strategy and define the leadership behaviors needed to deliver on that strategy. They take those behaviors and cascade training content through the company.

## 14 Make Sure Your Content Is Relevant And Applicable

This strategy sounds like common sense, but it isn’t practiced often enough. Remember to consistently show the relevance and applicability of your program. Ideally, your training is relevant and applicable on an individual level and a company level. To hit both, connect your initiative to the following:

- Company goals, objectives, and initiatives
- WIIFM: “What’s in it for me.”

Once you know the relevance and applicability on both the individual and the company level, remember to incorporate it early and often.

## 15 Sign a Pledge or Contract

Group pledges can help inspire your learners and motivate them to drive change together. At a leading restaurant chain, for example, learners all sign one giant banner at the start of the program to commit to learning. The first person to sign the banner is their CEO (a nice combination with strategy 13). They display the banner in their office throughout the program.

A contract can also be a more personal, reflective tool that helps your learners consider the benefits of training and the potential barriers to their success. By considering the likely benefits and challenges, your participants will build a more realistic vision of success.

## 16 Generate Buzz around Your Program with Raffles, Prizes, And Awards

Get creative with prizes and awards to generate buzz around learning. At a leading restaurant chain, for example, their leadership development team offers raffles with prizes that range from airplane tickets to lunch with the CEO. It's a simple way to boost engagement and get people talking about learning.

## 17 Channel Grassroots Energy to Foster a Culture of Learning

Ironically, often people's interest in programs increases when it's not delivered by HR or L&D. Enlisting respected team members with different expertise can increase credibility and interest. Consider employee-led TED Talks, more official employee-led learning, or "upskilling" from within. Similarly, peer-learning circles or peer-coaching circles are an affordable, scalable way to develop team members without structured classes.

The idea on your end is simple. Create a platform or system to help employees express topics of interest and to enable subject matter experts to share their expertise.

## 18 Hold "Office Hour" Style Coaching

An "office hour" approach fosters engagement by addressing real problems first, then learning second. Employees come in with questions and challenges they're facing. A coach or trainer then helps solve that problem using the learning frameworks from your program. At LEADx, we built out a live messaging system where learners can send messages directly to expert coaches asking about problems they're facing as they apply what they learned.

## 19 Make Your Training TIMELY

Grab your learners' attention by training them around a specific, highly relevant challenge. At Nestlé, for example, they train at the moment someone transitions from individual contributor to people leader. They simulate and train around the most common challenges faced during that transition. For instance, how do you manage the person who was your peer a week ago?

## 20 Tailor and Customize Training at the Team Level

Specific teams and departments may benefit from training around particular skills. For instance, a customer care team may struggle with high-stakes conversations. By pinpointing that problem and building training around it, you almost guarantee engagement. Tailoring at the team level ensures that every learner sees the connection between training and their performance.

## 21 Create Content in Response to Need Areas

During your training, look for areas where learners struggle to grasp or apply an important concept or skill. Then, build out guides, infographics, and video lessons that address that specific challenge.

### Apply These Strategies One at a Time

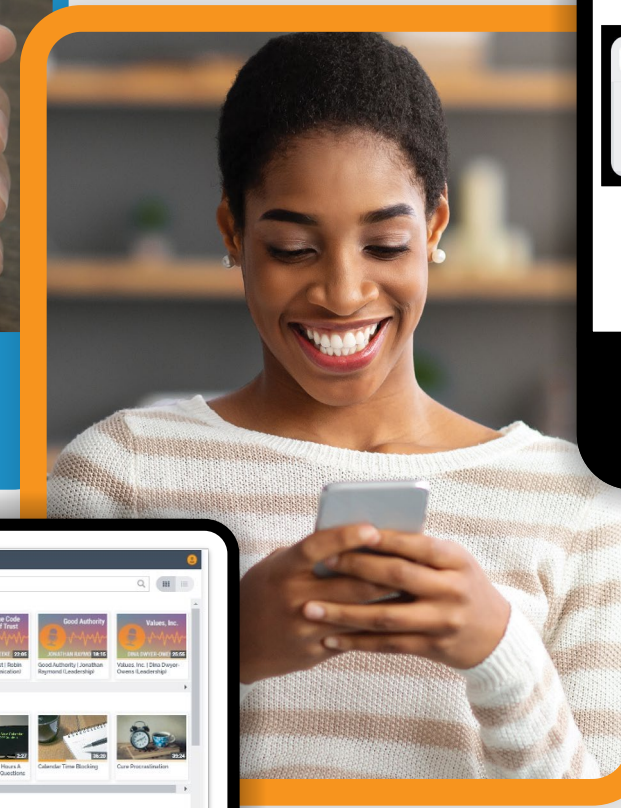
Rather than try to implement all twenty at once, we recommend picking one or two that best fit your audience, budget, resources, and style. Commit to making that strategy work. Once that strategy becomes a fixture in your program, choose another and commit. Before long, you'll have a set of tactics that spark engagement sewn into the fabric of your program. ■

**Gary DeNardo** is the Director of Customer Success at LEADx and **Evan Watkins** is your Editor at Large, as well as the Head of Content and Community at LEADx.

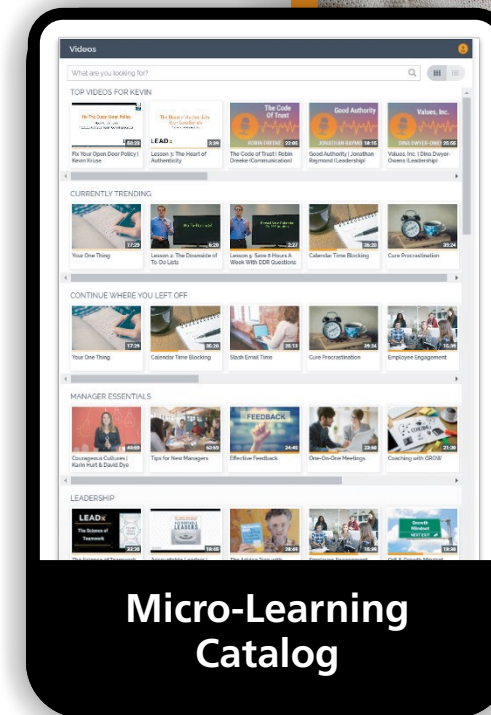
# Scale & Sustain Leadership Behaviors



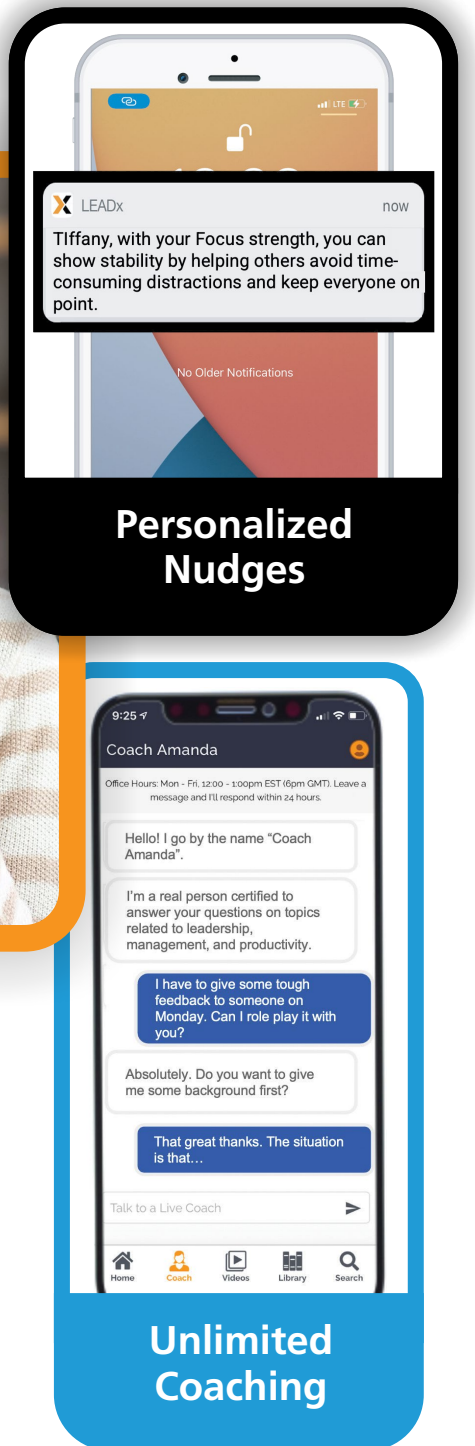
Personality Assessments



Personalized Nudges



Micro-Learning Catalog



Unlimited Coaching

Scale culture one behavior at a time with:

- AI-powered, behavioral nudges
- World-class virtual training
- Micro-learning in the flow of work

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**LEADx**

# This is Micki, Director of Leadership Development.



She needs to launch a new leadership series for first-time managers. They'll cover topics like **GROW Coaching, Effective One-On-Ones, Psychological Safety, & Trust.**

But, she keeps running into the same two problems:

1. People are too busy for long workshops
2. Online learning falls dead flat

Micki was at her wit's end until she found LEADx.

With LEADx, she built her own bundle of new manager skills and delivered them via micro-learning, personalized nudges, and group coaching.

**Usage jumped over 90% and new behaviors STUCK.**

**BOOK A DEMO**



**LEADx**

# The Future Of Learning Is 'On The Floor'

by Kevin Kruse



Imagine you're shopping for a printer at a big, warehouse-style store. Upon arriving at the electronics aisle, you discover that the shelf advertising the model you're looking for is empty. You find a nearby employee to inquire. She greets you warmly, and rather than leaving you waiting while she checks the back stockroom, she pulls up an inventory report on her phone. You learn the printer is out of stock at her store, but she can arrange to have one shipped to you. She gathers your information and makes the transaction right then and there. As you walk away satisfied, she smiles to herself, thankful her manager nudged her to watch a 2-minute video about effective customer conversations only hours earlier.

This kind of "on-the-floor" learning is the future of leadership development.

## Moving Learning out of the Classroom and into the Flow of Work

Most of us know what it's like to attend a classroom training session. You get pulled away from work for hours, and you try to make the most of your time. But, inevitably, the next day and the next week, you struggle to plug what you've learned into your day-to-day work. It's likely no surprise that, within just 24 hours of attending a training session, attendees will forget 70 percent of the information presented.

But there's a better way.

Leadership development pros are realizing that when learning doesn't happen "in the flow of work," learning simply doesn't happen.

"Learning can't be something that's carved off to the side," Sam's Club SVP and chief people officer Chris Shryock recently told me. "When I toured clubs, I felt like people development wasn't happening where daily work was happening. We've got to be right there, where associates are doing every other aspect of their job. If your learning program is not integrated with business processes, you're never going to be able to sustain it."

Shryock, who oversees training and development for 100,000 associates across 600 Sam's Club locations, has devoted a significant amount of attention to moving learning out of the classroom and onto the devices employees already use at work.

"I believe that our associates' work should be 'open book tests,'" said Shryock. "We want our associates to have the information they need at the moment they need it."

## Five Essentials for Learning On the Floor

To put your learning in the flow of work, you need a few tools in your toolkit. Here are five essential tools.

**TOOL #1: MICRO-LEARNING**

The best way for people to learn on the floor is with small, easy-to-digest pieces of content. Micro-learning closes the knowing-doing gap because, as Shryock discovered, when people can access information the moment they need it, they can apply it in real time.

For example, if a new manager has too much on her plate, she can pull up a short article with tips on how to delegate—right before meeting with her team. As such, on-the-floor micro-learning doesn't interrupt the workday like a longer classroom training. It's delivered as the work is happening—in short, non-disruptive bursts. An Association for Talent Development survey found that content that takes between two and five minutes to consume is most effective for micro-learning. As attention spans shrink and work responsibilities grow, managers will benefit from quick opportunities to learn on demand.

**TOOL #2: PERSONALIZED NUDGES**

Managers are busy. With workdays full of meetings and to-do's to tackle, "nudges" to learn go a long way. Professors and authors Richard Thaler and Cass Sunstein define a nudge as "an indirect suggestion or subtle reminder intended to influence your behavior." We experience nudges in daily life so often we don't even notice them. Calendar notifications, appointment reminders, and even traffic lights are all examples of nudges intended to influence our behavior in one way or another. Applied to leadership development, nudges are little reminders to consume or apply learning content.

What's more, personalizing nudges based on a leader's strengths or growth areas can be even more impactful. Leadership development is about creating habits, after all. And you can't form habits without a "cue" to perform a behavior. Nudges break through the noise of the modern workday to help leaders build learning habits into their schedules.

**TOOL #3: ON-DEMAND, "OFFICE-HOUR" STYLE COACHING**

Sometimes questions just can't wait. Those who have worked with a coach in the traditional sense know that the most valuable conversations are those that happen spur-of-the-moment. As learning and development pros give managers options for learning in the flow of work, it's important to also give people access to "coaching in the flow of work" as well. On-demand coaching offerings are becoming more widely available as the industry recognizes the need for more text-

based communication options. The ability to text or live chat with an elite coach can deepen learning and provide a way for participants to move past challenges and speedbumps as they attempt to apply what they learned.

**TOOL #4: PEER LEARNING NETWORKS**

Peer learning is crucial for any leadership development program—on the floor included. Managers are more likely to retain and apply new information when given the opportunity to talk about it with peers. Creating a learning environment for peers can also facilitate real-world problem-solving. Catholic Health's chief learning officer and vice president of organizational development, Tom Bigda-Peyton, leverages this approach. Cohorts of 8-10 managers and a facilitator regularly meet to discuss and workshop actual problems managers are facing.

"Ideally, the person [with the problem] starts to listen to their colleagues, and without necessarily reaching a solution, they will think about their problem differently—they will take away a new angle, an interesting idea, or a question to work from," said Bigda-Peyton. "People will start to realize how the problems they're facing are similar. So whether the learning was about decision-making, problem-solving, or collaboration, people begin to see how the learnings can be applied."

**TOOL #5: MANAGER SPONSORSHIP**

In talking with leadership development professionals about increasing learner engagement, engaging managers is the number one strategy they cite as being most effective. For an "on-the-floor" learning program to succeed, participants must have support and accountability from their managers, who are on the floor with them. When a manager asks her direct report about training, carves time out of her employees' schedules for learning, and models the skills the employee is learning, engagement skyrockets.

**Close the Knowing-Doing Gap and Increase Engagement**

While the title of this article is "The Future of Learning Is On The Floor," the future is already here for many leading organizations. To close the knowing-doing gap and increase learner engagement, take learning out of the classroom and put it in the flow of work. ■

# Curious how your most innovative peers scale and sustain a high-performance culture?

This question has been a passion of mine for decades now, so I put together a podcast devoted to answering it. I interview cutting-edge CPOs, CHROs, and CLOs to unearth the secrets behind their success.

Here are three of my favorite episodes so far:

- The Unique Way that Pinterest's CPO Scales and Sustains Culture
- The Importance of Increasing Your Talent Density with the CPO of Zapier
- Why Chaos Might Be the Missing Piece in Your Company Culture with the CPO of Rivian

— Kevin Kruse, CEO of LEADx



Give it a listen

LEADx

# How To Design And Deliver A Top-Notch Middle Manager Program



**M**iddle managers are really important—even more so than previously thought. According to Scott Mautz’s book, *Leading from the Middle*, middle managers account for 22% of variation in revenue. Replacing a bad middle manager increases productivity by 12%, and employees with a strong middle leader are 20% less likely to leave when offered a job elsewhere.

But it’s really hard to be an effective “manager of managers.”

Middle managers face an unparalleled barrage of opposing ideas, information, and conflict from bosses, peers, and direct reports—all at the same time. This comes at a cost. In constantly switching roles (from boss to peer to direct report), middle managers report extreme stress and emotional challenges. Mautz writes that 51% of middle managers say they worry about work constantly, and 43% describe their job’s pressure as “excessive.”

Middle managers are more important than ever before, but it’s never been harder to be one. That’s why designing and delivering top-notch middle manager training isn’t just a “nice to have.” It’s a business imperative.

## The Six Skills Middle Managers Need Most

The skills middle managers need are very different from those of brand-new managers. Typically, L&D places a lot of effort and focus on new manager skills. But, to leverage the power and influence of middle managers, L&D must help them develop specific skills that separate effective middle managers from effective frontline managers. Think more strategic, more creative, and more resilient.

In designing your middle manager training program, focus on the following skills.

### 1. SELF-AWARENESS

“Know thyself” isn’t just good life advice; it’s essential for effective leadership. The best middle managers are perceptive and self-aware. They understand that how they show up matters. They can observe their strengths, weaknesses, triggers, behavioral patterns, and emotions rather than being caught up in them. Helping leaders become more self-aware involves getting into leaders’ mindsets and limiting beliefs. Leaders must develop an understanding of why they act the way they do and how it might get in the way of behavior change. Assessments are a helpful tool in cultivating self-awareness. Assessments—completed by the leaders themselves, their managers, or peers—

provide useful feedback on blindspots and weaknesses. Self-awareness is the starting line on any behavior-change journey. With strong self-awareness, the development of all skills becomes easier.

### 2. STRATEGIC VISION

“Big picture thinking” is a critical middle management skill that frontline managers don’t necessarily rely on as often. Developing a strategic vision for the future requires being able to “see the forest, not just the trees.” Managers moving from frontline leadership to middle management are often used to spending much of their time and energy deep in day-to-day team operations. Train these middle leaders to zoom out and strategically craft and communicate a compelling vision for future success.

### 3. DECISION QUALITY

When you boil effective leadership down to its essence, it’s really about one thing: making good decisions. We make thousands of decisions every day—some inconsequential, some with the potential for lasting impact. Leaders face decisions about all sorts of things, from how to approach a difficult conversation with an underperforming team member to strategic decisions that impact the entirety of the business. As leaders climb the ranks, their decisions become increasingly impactful. Train middle managers on how to leverage data and weigh options for potential outcomes.

### 4. INNOVATION AND CREATIVITY

As the Leadership Circle Profile data shows us, leaders with a creative orientation are more effective. Creative leaders see opportunities where others see obstacles. They lead from a place of possibility rather than assumptions about how a leader should behave. This unlocks innovative thinking and problem-solving—key imperatives for success in an ever-changing and fast-paced environment. Contrary to popular belief, creativity is not something you either have or don’t. It is a learned skill, one that middle managers need to lead their teams into a future that demands it.

### 5. DRIVING CHANGE

We live in a volatile, uncertain, complex, and ambiguous world. As such, the most effective middle leaders know how to drive and thrive through change. They are adaptable and nimble and know how to rally team members around a shared vision of future outcomes in the midst of present uncertainty. Middle leaders must learn how to make big decisions based on the information available and then communicate change in a way that includes—rather than alienates—their teams. How each middle manager responds to change casts a ripple down to the front line.

### 6. RESILIENCE

Middle managers face pressure from above, below, and laterally from peers. That’s why, as mentioned before, 51% of middle managers worry about work constantly, and 43% describe their job’s pressure as “excessive.” Increasing resilience, or the ability to metabolize adversity into opportunity, is a key skill needed to thrive as a leader. Pressure and stress will always be present in the leadership journey. By learning strategies to increase resilience, leaders can better set themselves up to flourish in the midst of difficulty and “bounce back” more quickly following a hard season.

LEADx MANAGERS OF MANAGERS (MoM) PROGRAM					
COMPETENCY	Week 1	Week 2	Week 3	Week 4	
MONTH 1 ▶ Self-Awareness Big 5 Personality	Assess	Learn	Apply	Reflect	Group Coaching
MONTH 2 ▶ Strategic Vision	Learn	Self-Assess	Apply	Reflect	Group Coaching
MONTH 3 ▶ Decision Quality	Learn	Self-Assess	Apply	Reflect	Group Coaching
MONTH 4 ▶ Innovation & Creativity	Learn	Self-Assess	Apply	Reflect	Group Coaching
MONTH 5 ▶ Driving Change	Learn	Self-Assess	Apply	Reflect	Group Coaching
MONTH 6 ▶ Resilience	Learn	Self-Assess	Apply	Reflect	Group Coaching

Example of these key topics laid out in a monthly cadence with a focus on application.

### How to Create Systems of Development for Middle Managers

Learning alone doesn’t create behavior change. It’s not enough for leaders to know “Design Thinking” or “ADKAR Change Management” models. They must be able to apply those models on the job. Knowledge needs to become action, and action needs to become habit.

To build habits that stick, middle managers need systems of behavior change that support their devel-

opment often over time. That means leveraging micro-learning, micro-coaching exercises, assessment, nudges, self-reflection, group coaching, peer learning, and more.

Here are five tactics to leverage in order to build systems of development for middle managers.

### MICRO-LEARNING

Learning doesn’t have to take leaders away from their work. It doesn’t even need to occur in a classroom. Often, the best way for people to learn “in the flow of work” is with small, easy-to-digest pieces of content. Content that takes between two and five minutes to consume is most effective for micro-learning, according to the Association for Talent Development.

### 3-TO-1 LEARNING

The 3-to-1 Learning Model is the best way to help leaders move from “knowing” to “doing.” It involves planning three application exercises for every one learning event. These could include role-playing, on-the-job practice, reflection, and discussion. The curriculum on the previous page shows the 3-to-1 model in action.

### NUDGES

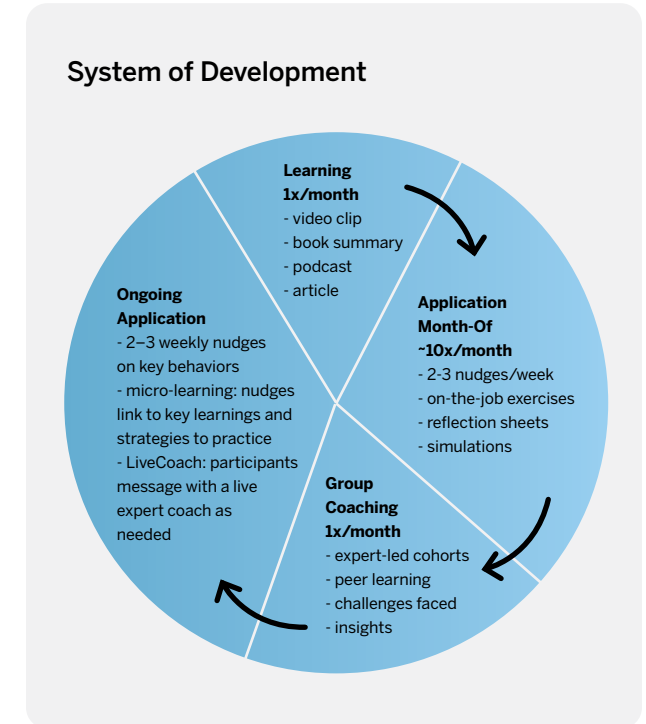
Little reminders to act, or “nudges,” go a long way in establishing new behaviors and solidifying habits. Developing leaders, after all, is about creating habits. And new habits require “cues.” Giving middle managers nudges to engage with learning or application activities will help them build skill practice into their workdays.

### LIVE GROUP COACHING AND PEER LEARNING

Giving peers the opportunity to learn and grow together is crucial for leadership development. Managers are more likely to retain and apply new information when they can discuss learnings and real-world case studies with peers. Adding a coach to a group setting only makes peer learning more impactful, as managers can learn from one another while also benefitting from the expertise of a seasoned coach.

### ON-DEMAND COACHING

Coaching is one of the best ways to offer leaders personalized support and accountability. As the industry recognizes the need for on-demand coaching, offerings are becoming more widely available that meet managers where they are. Texting or live chatting with a coach deepens learning pathways and offers support for leaders as they navigate roadblocks and practice new skills.



Sample image of the power of a behavior change system.

### Managers of Managers Stand at the Center of Influence

Middle managers are huge levers of influence—up, down, and with peers. They are arguably the most influential leaders within an organization, and unfortunately, they are often the most under-supported. Give them a full system of support as they develop key skills, and watch them drive serious results above, below, and beside them as a result! ■



## CASE INTERVIEWS

# How This Head Of Sales Training Used Micro-Learning And Nudges To Engage Busy Leaders



**Speak to hundreds of leadership development professionals each year. The best ones all seem to have something in common: Through challenges and times of change, they don't just survive, they find a way to thrive.**

I had the chance to interview Kristy Callahan, who was the senior director of commercial training & development at a large medical device company. She came on board about three years ago at the outset of COVID. Her sales reps, like most medical device sales reps at the time, were struggling to sell due to the challenges with access to customers.

Callahan and her team not only found a way to deliver highly relevant training to their sales leaders and sales reps, but they also capitalized on the moment of change to rethink and redesign their entire approach. Within a couple of years, they moved their training from more passive to more directional, from an archival resource to a system of behavior change. Here's how she did it.

## Content Libraries Lacked Clear Direction and Overwhelmed Busy Sales Leaders

*"Leaders would have access to some 300 pieces of content," Callahan said, "And they kept saying, 'It's just too much.'" —Kristy Callahan, Sr. Director Commercial Training & Development*

At the very outset of COVID, Callahan and her team were primarily using a learning library where learners could select lessons and videos and work at their own pace.

Initially, this worked well. With work-from-home mandates in place, people had the time to work at their own pace. Engagement rates were high regardless of what learning they pushed out. But, as more time passed, Callahan could tell engagement was slipping. She said, "People would look at the content, but the whole 'here's the well, come and drink,' just didn't work."

Considering how busy sales reps and sales leaders are, too many options worked against them. "Leaders would have access to some 300 pieces of content," Callahan said, "And

they kept saying, 'It's just too much.' The content library would also push out notifications about things that aren't relevant to them. These notifications became noise, and learners ignored them."

## Callahan Used Micro-Learning and Nudges to Make Learning More Personal and Directional

*We wanted something that was personalized, bite-size, and in the flow of work. —Kristy Callahan, Sr. Director Commercial Training & Development*

Callahan's solution was to put together a training program that was more personalized and directional. She wanted something that would help "break the normal way learners do things." She said, "We wanted something that was personalized, bite-size, and in the flow of work."

"Instead of a content library," Callahan said, "we decided to leverage a platform that's more directional. What I mean is that everything you could imagine is still available, like it is in a library format, but you don't see everything at once. The content that you need is delivered to you at the right time in your training."

To pilot the new platform, Callahan built out a 12-week plan where 25 sales leaders went through self-awareness training (with DISC), Crucial Conversations training, and training for "Developing Others." The content was delivered in a flipped classroom model where sales leaders did three weekly micro-learning and micro-coaching exercises followed by a workshop-style session.

The impact was immediate. Callahan said, "Our managers found that when they faced a certain situation, they knew there would be something in the platform that would help. This created learner agency. People trusted the content."

Some key results from their pilot include:

- 100% of participants said that the micro-learning and nudges would help them coach and develop their team.
- Participants engaged with micro-learnings an average of 16 times, and the number continued to increase after the pilot (showing that the platform continued to help drive behavior change beyond the set dates of learning).
- Qualitative comments showed that sales leaders were pleased with the way the micro-learning flowed with their work and that the content felt highly relevant.

## Scaling with Strategy: Callahan Gathered Data To Inform Training Topics as She Expanded

With such a positive response to their new approach, Callahan and her team then looked to employ it strategically to a larger audience.

To drive their strategy, Callahan used a Gartner assessment to identify "drive" and "drag" areas. A "drive" refers to a manager's strength, and a "drag" refers to a challenge or area that is holding a manager back. Callahan then ran the data on "drags" for each business so that she could identify what was holding each business back the most.

From previous training, Callahan knew that when their training targeted a specific competency, they could produce a 48% increase in that competency. For example, they assessed each competency at four levels of skill: Basic, Understanding, Effective, and Role Model. At 48% growth, that means the average rep who focuses on the competency "Business Acumen" with their manager would bump up two levels in skill from "Basic" to "Effective" or from "Understanding" to "Role Model."

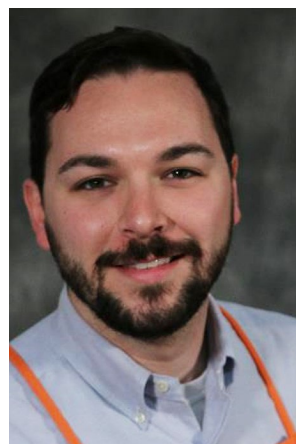
Their primary strategy to get that 48% boost was to focus on the manager-rep coaching relationship. Managers would partner with their rep to focus on that specific competency, and then they would help coach them toward improvement.

So, Callahan decided to build out cohorts of managers who had the same "drag" and put them through a program with content specifically addressing that challenge. For example, leaders whose greatest drag was "Coaching for Performance" will go through a four-week training program on coaching together. The first three weeks consist of micro-learnings and behavioral nudges. And the fourth week is a group coaching session co-facilitated by a vice president and a training & development professional.

## Data-Informed + Highly Engaging = ROI

Callahan constructed the perfect recipe for ROI: She used data to find the topics with the most potential for impact, and then she delivered those topics in a way that best engaged her busy sales teams. ■

# How The Home Depot Uses Nudges To Scale World-Class Leadership Development



**We don't just sell hammers. We develop people.**

— Michael Cabe, Senior Manager, Learning Strategy at The Home Depot

**I**n 2019, The Home Depot ran into a fascinating challenge. Their high-potential leadership development program was a huge success. But, to achieve its success, the program relied on a high-touch, hard-to-scale approach. The challenge was this: To replicate the success of their “High-Potential Program” in their “New Director Program” (which had a much larger audience).

To learn how The Home Depot managed to successfully overcome this challenge, I had the privilege to meet with their Sr. Manager of Learning Strategy, Michael Cabe.

Cabe and his team build and run ongoing leadership development at The Home Depot. They help turn learning into behavior change by designing and delivering a consistent cadence of action learning and peer meetings.

Here's what Cabe and his team did to pull it off.

## The Origin Story: A Wildly Successful High-Potential Program

As is often the case with director-level and above leadership development programs, their initial success relied on a high-touch, highly customized approach.

“The program had all the bells and whistles,” Cabe said. “It had executive sponsorship, internal senior leader coaches. It had everything you could imagine for a carefully crafted high-potential development program. And it was working. The learning was sticky, and behavior change was there.”

The results came through strong. Desired behaviors increased significantly after six months.

Cabe and his team knew the model was right. They just needed to figure out why the model worked so well. “Before we tried to scale,” Cabe said, “we first backed up and asked the question: what really made this program so successful?”

## What Made the Program Successful? Action Learning, Not “Bells & Whistles.”

*If you whittle it down, it wasn't the high-touch approach that made the program so successful. It was that the high-tough approach supported, even springboarded, practice and behavior change. It facilitated what The Home Depot calls “action learning.”* —Michael Cabe, Senior Manager, Learning Strategy at The Home Depot

Cabe realized that it wasn't the highly customized, hands-on approach that enabled the program to succeed. It was that the high-touch approach enabled leaders to practice and build positive habits. Specifically, senior leaders served as hands-on coaches and their boutique LMS facilitated engagement with what Cabe calls “action learning.”

“Action learning” is actionable micro-content. High-potential leaders, typically spurred on by their coach, would engage with micro-content to practice and reflect based on what they learned. The more leaders engaged with the content and practiced it in their daily work, the more behavior changed and new habits formed.

To successfully scale this approach, Cabe and his team needed to find a way to get leaders to engage with their action learning without hands-on coaches and a boutique LMS. Cabe said, “We knew the content was right. We knew how to impact behavior change. But we had to get them to do the work.”

In came nudges...

## Email Nudges Enabled The Home Depot to Scale High-Quality Leadership Development (At No Cost)

*You just have to nudge them. That's the scalable solution.* —Michael Cabe, Senior Manager, Learning Strategy at The Home Depot

To get new directors to engage with the follow-up exercises and tools without a coach, Cabe knew he had to work smart.

He decided to deliver follow-up exercises in the native environment of their learners. “What we learned was that if we leave it up to the learner to go get their learning, only a handful will do it. The vast majority won't. What we need to do instead is remove the friction between the *learning* and the *learner*. We had to make learning seamless and available at their fingertips,” Cabe said.

Their solution was to build out an automated system of email nudges (using Microsoft Power Automate) to deliver action learning directly to learners' inboxes.

By putting the nudges where leaders were already the most responsive (email), Cabe greatly increased the odds that the nudges would trigger action. He said, “I'm enterprise wide. I've got folks in the field, in stores, in warehouses, driving from point A to point B all day long, visiting different locations, sitting at a desk for an hour, or constantly in meetings. The one constant across all of these leaders? Email. We are a very email-driven culture. We're very responsive to emails. So I knew that was the best place to deliver nudges.”

The next piece to the puzzle was to develop and deliver nudges that best initiated action. They didn't want nudges to feel like pesky reminders or irrelevant additions to learners' workloads.

### Three Types of Nudges Helped Pull Learning Through

*Our goal with our learning is to learn from doing.* — Michael Cabe, Senior Manager, Learning Strategy at The Home Depot

Action learnings and peer sessions bridge the gap between two, two-day in-person training programs over the course of six months: a kick-off and wrap-up session. Between these two in-person meetings, new directors receive an action learning nudge every week and participate in cohort meetings together every other week.

The nudges filled three key purposes:

**PURPOSE #1:** Action Learning Delivery. Nudges delivered fillable PDFs that are frictionless for the learner—zero steps, zero links, zero sign-in.

**PURPOSE #2:** Reminders. Since the action learning work is mandatory and informs their peer meetings, a nudge prior to each peer meeting helps remind the directors to complete the exercise beforehand.

**PURPOSE #3:** Follow-up. Nudges also followed up after peer meetings to say, “In case you missed it, meet with a peer to learn what happened,” and, “Here’s the next set of work to complete before our next peer meeting.”

With nudges driving action learning for new directors, Cabe’s team saw attendance at peer meetings and in-person sessions increase. Engagement with the content and the quality of discussions in peer meetings also increased considerably.

### Three Lessons Cabe Learned as He Scaled with Nudges

*We tried everything. You can't even imagine the number of failures that we had. We tried to go glamorous and use the newest shiny product. We tried to find the silver bullet. But, we found that the more ornate the solution, the less effective it turned out to be.* —Michael Cabe, Senior Manager, Learning Strategy at The Home Depot

For those of you looking to scale your own training with nudges, Cabe was generous enough to share his top three lessons learned along the way:

**LESSON #1:** Nudges should be native. Put your nudges where your learners already work. “‘Native to your learner’ is going to be different across organizations,” Cabe said. “There are certain organizations where, instead of dropping a nudge in their email, you would drop it in Slack or Teams. You have to crack the code of your cultural barriers to understand where your learners are native. Where are your employees spending their time? Where are their to-do lists? Then you figure out how to put your nudges there.”

**LESSON #2:** Create the feeling of “this is definitely what I should be doing.” In addition to delivering nudges where your leaders work, your content should feel as seamless to their usual work as possible. “The feeling your leaders should have when your nudge comes through is ‘I should be doing this already, but I’m not,’” Cabe said. The less your leaders can distinguish between their daily work and your learning, the better.

**LESSON #3:** Leverage the ripple effect of action learning nudges. “One intervention or one activity could go up the organization or down the organization. One leader’s action learning can develop a whole swath of folks,” Cabe said. He emphasized using activities like:

- Finding a peer or partner
- Holding a conversation with your leader
- Talking to your team ■

# How Penske Paves The Way To A Legendary Culture Of Learning



*We don't compete with the same vehicles we used 20 years ago, and we don't develop talent the way we did 20 years ago, either!* — Laura Heaton, VP of Talent Development, Penske Transportation Solutions

**Y**ou can hardly leave your house without spotting an iconic yellow Penske truck. And, that’s just one piece of Penske Corporation’s \$37 billion business. With thousands of locations around the world and a diverse workforce of more than 67,000 people, Penske operates businesses spanning truck leasing and fleet maintenance, retail automotive, transportation logistics, and professional motorsports.

At Penske Transportation Solutions based in Reading, Pennsylvania, which itself has a workforce of more than 40,000 people, scaling leadership development presents a huge challenge: How do you help 6,000 people in leadership positions develop the skills and knowledge that they need to thrive in an increasingly complex and fast-paced environment?

At the forefront of Penske Transportation Solutions’ success in leadership development is their vice president of talent development, Laura Heaton. Under Heaton’s leadership over the last eight years, the team has grown from 20 to 70 people and earned the coveted 2022 CLO Award. On top of that, their leadership development program completion rates are the envy of the leadership development world:

- 95% of their 5,200 frontline leaders complete leadership development training.
- At the director level and higher, they reach nearly a 100% completion rate.

In this interview, Heaton shares how her team paves the way to such a powerful culture of learning.

### Penske Builds a Culture of Learning with Vertical Development

Perhaps the most powerful way to build a culture of learning is to offer training that is truly transformative.

At Penske Transportation Solutions, they do this by using an approach to learning that strives to fundamentally expand and deepen the way people think. The approach is called vertical development. “Think of vertical development,” Heaton explained, as growing your capacity to not only handle more content, but to process it more complexly along cognitive, emotional, and behavioral dimensions.”

“This differs from the traditional ‘horizontal development’ where you acquire new content, knowledge, and practice skills. Horizontal development is still necessary, but insufficient for people in today’s business context.”

The idea is to help leaders think differently. “We try to get people to see beyond just ‘black and white,’ ‘right and wrong,’ to something more dynamic and interdependent.” The learning theory is more complex to apply, but then again so are today’s vehicles.” Heaton said.

So, what does this look like for each level of leadership development? Heaton and her team developed their leadership competencies based on the organization’s brand principles (which were developed by their Marketing department). Then, they identified specific behaviors that best embody those principles at each level of leadership.

“Our guiding brand principles are People Helping People, Dedication to Excellence, and Value Fresh Thinking.” By drilling down to specific observable

behaviors at different levels of leadership responsibility we clarify what success looks like. This makes it easier to provide helpful performance coaching and more targeted development resources. “The behavioral expectations become much more complex as you go up the ladder,” Heaton said. “It wouldn’t be fair to hold an early career associate to the same level of complexity that we would a vice president. Many organizational competency models make the error of one size fits all. We opted for more precision.”

<b>Leading Self</b>	Delivers results that are thorough, timely, and accurate.
<b>Leading Others</b>	Identifies and clears performance barriers and builds capability for achieving new levels of team performance. Partners with others.
<b>Leading Leaders</b>	Creates a sense of shared purpose in service of our commitments to our associates, customers, industries, and communities.
<b>Leading a Business Unit</b>	Develops a diverse leadership team that has a positive impact on the organization's values, performance, and culture.
<b>Leading an Enterprise Function</b>	Applies wisdom when managing the tension inherent in short and long-term interests in service of the well-being of the organization, customers, industries, and communities.

Example of one stratified brand principle across leadership levels.

### Vertical Development In Action: The ‘Taking the Lead’ Frontline Leader Program

Penske’s “Taking the Lead” frontline leader program is an excellent example of what vertical development looks like in action.

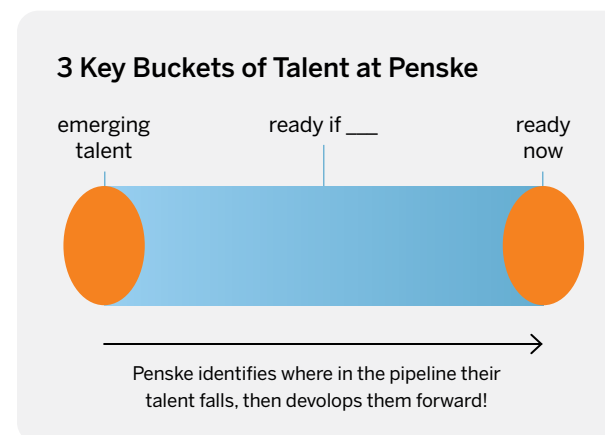
In many ways, the program is structured like other high-quality frontline leader programs. It is seventeen weeks long with weekly four-hour learning sessions that are supported by homework, social learning, and self-awareness assessments (emotional intelligence and personality). This sets the foundation for the next level of leadership where we get quite a bit deeper with self-awareness.

It’s not until you start to drill down into “how” they train leaders that you get a sense for what vertical development looks like in action. Take, for example, the topic of delegation: “At that first level of leader,” Heaton said, “you need to know how to prioritize your work and delegate. However, we don’t just teach one delegation technique; we teach three. Then, we tell them that there’s no one right way. This helps our frontline leaders to start to peel away from the ‘tell me what to do’ or ‘one right way’ way of making sense of the world.” As Heaton and her team apply a vertical development approach to each skill or mindset, leaders quickly start to think and learn differently.

### Vertical Development + 3 Key Tactics = A Culture of Learning

If you think of vertical development as the “how” behind Penske’s culture of learning, then you can think of these three tactics as the “what.” Heaton and her team power a culture of learning through three highly effective strategies:

1. Cohorts. Penske designed intact cohorts around key leadership transitions. That way leaders would go through the same psychological experience at the same time. Within their cohorts, they leverage social learning in duos, trios, and teams. They adjust the size of learning groups to maximize psychological safety for each activity. Building a strong network of relationships is an enduring resource.
2. Automatic enrollment. Penske makes leadership development a requirement of the role. They even enroll leaders automatically as a part of their transition into their new leadership roles.
3. Quarterly development reviews. Perhaps the biggest strategy Penske employs to foster a culture of learning is their system of quarterly talent review meetings, which are led by the senior-most leader of the business:
  - Quarter 1: Managers identify candidates demonstrating high potential. Managers sort talent into three main buckets: 1) Who is ready now? 2) Who is ready if \_\_\_? 3) Who is emerging talent?
  - Quarter 2: They conduct a review of each employee’s engagement in the development process so far. At this point, they also show managers the different development opportunities available to their talent. Heaton and her team give leaders guidance and templates for how to have effective career conversations with their employees.
  - Quarter 3: They highlight the results of development efforts and check in to see how career conversations are going.
  - Quarter 4: This quarter is about accountability. They assess for changes in readiness and set up emerging talent with stretch projects.



Penske sorts talent into three key buckets, and develops them accordingly.

### Penske Sparks a Culture of Learning by Transforming Leaders

The secret to Penske’s powerful culture of learning lies in their ability to have a transformative impact on their leaders.

One of the most impressive examples is their director-level leadership development program. At the end of the intensive, 14-month experience, the directors stand up and tell a story of their learning journey. The stories are so inspiring that executives will fly in to listen. Heaton said, “Many of our people will tell a story about how they fundamentally see themselves in the world differently because of this program. How their life has changed, and what it means to them. And that impacts all our executives. They do not want to miss those stories.” ■

# How HubSpot Sustains A Customer-Centric Culture Across 7k Hybrid Employees



## Customer-Centric Culture at HubSpot Begins with HEART

**Kevin Kruse: How would you describe your company's culture in a few words?**

**Eimear Marrinan:** Our culture is best described as “solving for the customer.” We favor autonomy, accountability, and flexibility, and we’re committed to building a diverse, inclusive, and sustainable organization.

Our values are the traits that we admire and celebrate, summarized in the acronym HEART, which stands for humble, empathetic, adaptable, remarkable, and transparent.

In 2013, our co-founder, Dharmesh Shah, wrote the Culture Code, a 120-page slide deck that delves into what we value, how we work, and who we aspire to be.

## HubSpot Upholds its Culture with Founder-Led Content, Measurement, and Activation Events

**Kruse: What are some of the ways in which you foster or sustain this culture?**

**Marrinan:** Three things come to mind.

The first thing is that we invest in our culture and spend time thinking about it. Our co-founder, Shah, wrote our Culture Code. There are also my role and team, and our purpose is to help activate our culture, drive initiatives to support it and keep an eye on it and its health.

The second thing we do is measure culture. We measure it quarterly in our employee survey to see how we’re doing and get employee feedback. We also seek to identify whether anything needs to be course-corrected.

The third piece has to do with our key activation events, which bring our culture to life.

**Kruse: Can you give a few examples of these activation events?**

**Marrinan:** One example involves being customer-centric. At our quarterly company meeting, the first slot is a customer interview. We ask a customer to join us, and we speak to them live in front of all 7,000 employees. We ask them about what works for them and what does not. We need this feedback from our customers, and we need everyone to hear it. We also ask the customer, “If you had a magic wand, what would you change?” It might seem simple, but these moments help bring our customers to life for the organization.

A second example is how we activate our values. Once a year, we have HEART Week, a week-long event to celebrate, talk about, and remind people of our values.

As the final example, I will return to an earlier point where I mentioned that we want to build a diverse, inclusive, and sustainable company. This means growing our people in the right way and making sure that they have opportunities to take a break and unwind. One of my favorite traditions is our annual Week of Rest in early July. The entire company shuts down. HubSpotters return from that week of rest without worrying about their emails piling up.

## The Connect4 Initiative Helps Connect Hybrid Employees

**Kruse: Culturally speaking, are there particular initiatives or results you’re most proud of?**

**Marrinan:** Our newly launched initiative, Connect4. Our recent employee net promoter score (ENPS) survey found that upon moving to a hybrid organization, people felt disconnected from others outside of their teams. The idea behind Connect4 was to build ways to connect HubSpotters in a hybrid world. The focus is on connecting with purpose, ease, and equity, regardless of location. Ensuring sustainable connections is also a priority, which means that connection can’t solely entail flying everybody around the world. (We’re highly focused on ESG and achieving net carbon 0 by 2040.)

## HubSpot Develops Culture by Developing Their First-Line Leaders

**Kruse: Since an employee's relationship with their manager accounts for 70% of their engagement, how do you develop your first-line managers?**

**Marrinan:** First, we have dedicated learning and talent development programs for new managers. This includes “Leadership Foundations,” a program designed for new managers who have just joined or been promoted. The course walks through the entire lifecycle of a manager and offers various skills and training sessions.

Second, we offer self-service leadership courses created by our learning and talent development team. These courses focus on essential topics such as coaching, feedback, and performance management. Alongside these courses, we provide a wealth of self-service materials, including insights from fellow managers on what works and what does not.

Third, we launched a program for our managers called “The Coaching Corner.” Through this platform, managers can connect with peers to discuss critical topics. Learning from other managers has proven to be a successful approach. While theory is valuable, learning from the experiences of others is often more consumable and practical.

Lastly, we have a program called “Hub Talks,” which brings in external experts to educate us on relevant topics. We’ve had the privilege of hosting remarkable individuals such as Marcus Collins, the author of *For the Culture*, Dom Price from Atlassian, and Kim Scott, the author of *Radical Candor*.

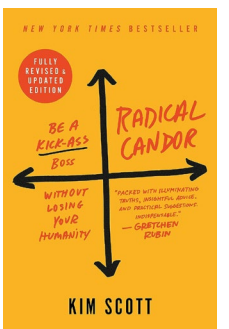
## The One Skill that Marrinan Values the Most at HubSpot: Radical Candor

**Kruse: What skill or behavior do you wish could be more frequently displayed among your employees?**

**Marrinan:** Radical candor: “transparency and empathy” and “a high-performing culture” often feel at odds. I would ask all of our HubSpotters to lean into feedback and make sure that we’re practicing giving and receiving feedback. It’s tough, but making sure that feedback is direct, kind, and clear is the way to go.

**Kruse: What book would you recommend your colleagues read?**

**Marrinan:** Kim Scott’s *Radical Candor*, since we are focused on high performance and the behavior of giving candid and empathetic feedback. ■



\* This interview has been edited for clarity and concision.

# How Veeva Drives A Culture Of Speed On Its Growth Path To 10k Employees



**H**ow do you create a culture that revolves around speed at a company with 7,000 employees across more than 40 countries?

To learn, I met with Vivian Welsh, the chief people officer (CPO) of Veeva Systems. Veeva Systems is a high-growth software company that primarily supports BioPharma companies in their mission to improve health and extend human life. Veeva provides software, data, and services that help expedite processes, such as delivering medicine to patients more efficiently.

## Veeva Culture Revolves around “Doing the Right Thing, Customer Success, Employee Success, and Speed”

**Kevin Kruse:** How would you describe your company culture in just a few words?

**Vivian Welsh:** Our vision and values align with our culture at Veeva. Our vision is that we are focused on building the industry cloud for life sciences. And our values revolve around doing the right thing, customer success, employee success, and speed. Having these common values that we all agree with and live each day helps shape the company's culture.

## Leadership Development Drives Engagement at Veeva

**Kruse:** 70% of engagement is correlated to the manager, and front-line managers account for more employees than any other leadership group. What are some of the ways you develop your first-line managers?

**Welsh:** When a person first becomes a manager via promotion or transfer, they go through Veeva Manager Boot Camp to learn about our philosophies, our practices, and the ways we engage with employees. We keep it simple, but there

are certain things that we make sure they understand and practice to be effective managers.

We also have our managers' communities of practice, where managers can learn from each other and learn by doing. It's a cross-functional cohort. They meet on Zoom, either impromptu or scheduled, to ask for guidance and learn from each other. The idea is that you don't always have to learn from your manager. You can learn from other leaders. You can learn from your peers, and you can learn by observing folks with more experience. We want to make sure to enable and support that type of learning.

## Keeping Tabs on Engagement: A Check-In Process that Creates Authentic and Honest Dialogue

**Kruse:** How do you solicit employee feedback about the culture and their engagement?

**Welsh:** We have a unique check-in process. It's an open, simple, and authentic conversation between employees and managers. The employee discusses their engagement, and then they elaborate on that. The employee sets their engagement level, and then the manager sets the employee's performance. It's a two-way conversation where the employee gets to talk about how it's going for them at Veeva, in their role, and with their job requirements. They also talk about strengths and growth areas.

**Kruse:** Is this an annual performance review or something different?

**Welsh:** We evolved from an annual performance review. We used to hold yearly reviews that were more formal analyses of accomplishments where a rating was assigned to the employee. We moved away from that annual performance review to a twice-a-year check-in process. The check-in process has helped create more honest, authentic dialogue and better communication between the employee and the manager.

## The One Skill Welsh Wants to See Employees Exhibit: Slowing Down Their Thinking

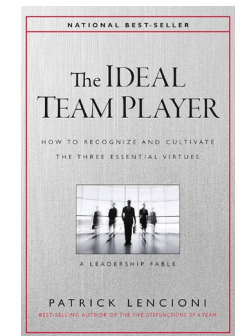
**Kruse:** What skill or behavior do you wish your employees exhibited?

**Welsh:** Because one of our core values is speed, we're always accomplishing a lot in a short period of time. It's just as important to stop and slow down to think. We need to all learn to engage in some slower, more systematic thinking to see a different perspective or approach things a little differently.

## Welsh's Top Book Recommendation for HR Professionals: The Ideal Team Player

**Kruse:** What book would you recommend that your colleagues read?

**Welsh:** *The Ideal Team Player* by Patrick Lencioni. That's a great book to remember to stay humble, share credit, and share the team's success. At Veeva, we like to hire folks who are nice, hardworking, and fast learners. We must earn the position we're in every day when we show up to work. This book serves as a good reminder to stay humble.



## Rapid Growth at Veeva: From 7k to 10k Employees by 2025

**Kruse:** What excites you the most about your company right now?

**Welsh:** We've come quite a long way in 15 years, but there's still so much room to grow. We have many more applications and innovations to bring to the market. We're 7,000 people now, and we're hoping to be 10,000 by 2025. ■

\* This interview has been edited for clarity and concision.

# How The CPO Of Dropbox Creates A Thriving Remote-First Culture



**H**ow does a company like Dropbox sustain a thriving culture with a fully remote workforce?

I recently had the opportunity to interview Dropbox's Chief People Officer (CPO), Melanie Rosenwasser, to find out.

Dropbox is a cloud storage, file sync, and file share company. With a mission "to design a more enlightened way of working," it has over 700 million customers who keep their most important files on the platform. In fact, many customers run their entire business on Dropbox. Its headquarters are in San Francisco, with 2,500 employees globally.

*\* This interview has been edited for clarity and concision.*

## Dropbox's Culture in Three Phrases: 'Tech-Led, Human-Centric, and Work-Life Harmony'

**Kevin Kruse:** How would you describe Dropbox's culture in a few words?

**Melanie Rosenwasser:** Technology-led, human-centric, and work-life harmony.

**Kruse:** Can you elaborate a bit on what you mean by "tech-led"?

**Rosenwasser:** Drew Houston, who's our founder, is an engineer first and a technologist at heart. He's amongst our most prolific and sophisticated coders, and he often demos his stuff to the company. It's incredibly inspiring, not only to our tech community but to all employees.

Another way we facilitate a tech-led culture is through what we call "Dropbox Hack Week," which we conduct every summer. This is where we encourage employees to pause their day job and imagine what the future might look like for our customers, our business, and our own work lives. One of our more popular products, "Capture," was actually developed out of Hack Week in response to the rise in distributed work. It's a visual communication tool that helps team members share their work and ideas asynchronously using videos and screenshots.

## Dropbox Develops Its Culture by Developing Its First-Line Leaders

**Kruse:** Since 70% of engagement is correlated to the manager, how do you develop your first-line leaders?

**Rosenwasser:** Manager capability is incredibly important, especially in a virtual context. Managers need the skills to communicate goals, build relationships, and create psychological safety in a remote world. We've always made manager training a top priority in our virtual-first approach, and we've refined our programming and talent processes to best support and invest in our managers.

**Kruse:** Can you provide a couple of examples?

**Rosenwasser:** We have High Impact Leadership Training, which focuses on scaling up results-driven and people-oriented leaders. These training sessions are structured to reinforce our values and company behaviors.

We also offer tiered leadership experiences to support different levels of managers. If you're a first-time manager, the needs and skills look a little different than if you're more seasoned. Our offerings are differentiated based on where you are on your leadership journey. We also have accelerator programs for top talent, including in-person intensive cohort-based learning, peer coaching pods, and external executive coaching.

## Dropbox Has a 'Chief People Officer in Residence' Program to Foster Future Leaders

**Kruse:** Are there any particular cultural initiatives you're most proud of?

**Rosenwasser:** I recently implemented the Chief People Officer in Residence program. A number of my former leadership team members have actually gone on to become chief people officers themselves. While losing top talent is hard, I'm proud that Dropbox has been a part of their journey. So I wanted to create a more formal program that harnesses the HR leadership experience here to leverage future leadership opportunities, whether internal or external.

**Kruse:** What does this program look like, and why did you create it?

**Rosenwasser:** It's a nomination-based 18-month rotational development program. We have assignments across different organizations and the People Team, like HR business partners, executive recruiting, compensation, and other aspects of HR. The program highlights include job shadowing, board mentorship, and executive education. This year's participant is being sponsored to attend the Modern Chief Human Resources Officer (CHRO) program at Cornell.

The notion behind this program is to widen the aperture around developing talent. So much talent development is about keeping people in your organization for as long as possible. I do believe that part of this program is about retention, but another part is to prepare them for their next amazing role externally.

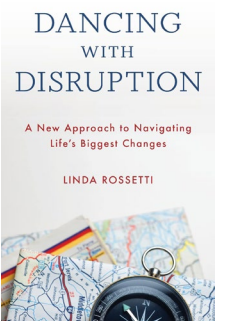
## The One Skill Rosenwasser Values Most at Dropbox: Design Thinking

**Kruse:** What skill or behavior do you wish your employees exhibited?

**Rosenwasser:** Design thinking: designing with the end user in mind. Of course, our product managers, designers, and engineers possess this skill, but we have less mastery of this in other areas. In HR, for example, we facilitate a large volume of employee-related or employee-experience programs. We recently mapped out some user journeys. One stat I'll share is that in one quarter alone, our managers received almost 240 Slack or email messages from the company, and 42% were from the HR team. We need to ask, "Why?" More is not necessarily better, and we need to be designing for impact, not volume. So we have a significant push this year and the next to level up our design thinking and remove friction from the employee experience.

**Kruse:** What book would you recommend to those in people development?

**Rosenwasser:** *Dancing with Disruption* explores the idea of embracing uncertainty and even hardship with a learning mindset. It's brought to life through these incredible personal stories. The book also includes a number of exercises and frameworks to help put this into practice.



## How Dropbox Built (and Now Sustains) a Thriving Virtual-First Culture

**Kruse:** Dropbox hasn't moved to a hybrid model or mandated a return to the office. Could you tell us more about the philosophy behind this decision and how you've managed to maintain a thriving culture while being virtual-first?

**Rosenwasser:** We launched the virtual-first model in October 2020. Remote work is the primary experience for our employees. However, we still come together as teams for planned in-person collaboration and connection at least four times per year for events such as offsites, strategy sessions, and planning meetings. We intentionally don't believe in mandating specific office days. The reason for this is to avoid creating two distinct employee experiences that could impact factors like performance and promotion over time. The core principle of virtual-first is to maintain a level playing field.

**Kruse:** How do you support virtual work for your employees?

**Rosenwasser:** We have some unique strategies to support this model. For instance, we facilitate what we call "core collaboration hours." These are four-hour windows for meetings that overlap based on time zones. For example, core collaboration hours on the West Coast are 9 a.m. to 1 p.m., which overlaps with the East Coast's 12 p.m. to 4 p.m. This approach allows for deep work and offers flexibility and agency over how one's time outside of meetings is spent. We refer

to these as "nonlinear workdays." This could involve running errands, taking a class, or tending to family needs during breaks. We value personalized rituals that help reset and energize throughout the day, understanding that these look different for everyone.

The inherent flexibility doesn't aim to achieve a perfect 50/50 work-life balance, as it varies greatly depending on individuals. Our focus is on work-life harmony, trusting our employees to facilitate what works best for them.

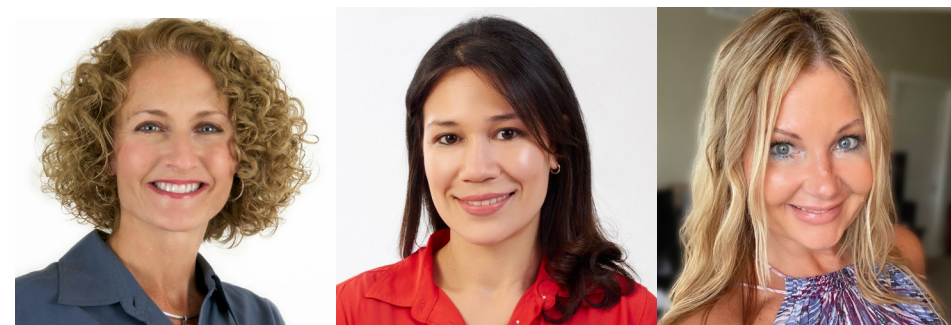
## What Excites Rosenwasser Most about the Future of Dropbox

**KK:** What excites you the most about Dropbox right now?

**Rosenwasser:** Generative AI is very top of mind for us. What's really exciting is how this technology can improve our working lives. The majority of our time is spent on what we call "work about work," such as searching for content versus actually getting impactful work done. We see a massive opportunity here to leverage AI in a way that helps eliminate this work about work so you can focus.

The application of this is especially relevant to the virtual-first approach. We're effectively a distributed team building for distributed teams, which positions us to bring products and tools to the market that support these new ways of working. ■

# How Ascensus Scales Elite-Quality Training To Their First-Line And Emerging Leaders



Tricia Reese, Lucy Albert, and Megan Cashdollar, key members of the Ascensus leadership development team.

**F**irst-line leaders lead about 80% of the workforce, making them critical to company success. Yet, when it comes to leadership development, addressing first-line leaders is where most companies fall short. The audience gets much bigger, and the strategies that worked for directors and VPs (i.e., executive coaches, boutique LMSs, and a high-touch approach) become unrealistic.

But the good news is that putting together a high-quality first-line leader program is feasible. You just have to adjust your approach and leverage the right tools.

Ascensus stands as a prime example to follow. Ascensus is a market-leading enabler of tax-advantaged savings—providing technology, services, and expertise that help more than 15 million people save for retirement, education, and healthcare. They offer comprehensive qualified and non-qualified retirement plan solutions, third-party retirement plan administration, 529 education and ABLE savings program administration, health savings and COBRA administration, corporate- and bank-owned life insurance solutions, and fiduciary and total rewards services.

To share their approach, three key members of the Ascensus leadership development team agreed to meet for an interview: Tricia Reese, VP of Leadership, Learning, and Organizational Development; Megan Cashdollar, Sr. Leadership and Organizational Development Specialist; and Lucy Albert, Sr. Leadership and Organizational Development Specialist.

Here's a look under the hood at why they built out this program, how they did it, and a snapshot of their impressive results after year one:



### The Importance of Emerging and First-Line Leaders at Ascensus

At the heart of this leadership development team’s approach is their understanding of the value potential of both emerging and first-line leader programs.

When it comes to emerging leaders, Reese broke it down this way: “We expanded into developing our emerging leaders to build a pipeline. It’s about not only having bench strength but also about having a diverse leadership pipeline. By starting to dig deeper into the organization, we gather a wider pool of diverse talent that we can develop earlier in their careers.”

And when it comes to first-line leaders, Reese explained the value as follows: “To move from individual contributor to first-line leader is one of the biggest career leaps you can make. It can be an intimidating transition and one that requires support. Also, the importance of first-line leaders can't be underestimated. They lead about 80% of the organization. They're the linchpin to executing strategy, and they and their direct reports have more client contact than anyone else in our organization.”

Reese, Cashdollar, and Albert knew the importance of emerging and first-line leaders. Now, they just needed to execute on a program that would drive results.

### Ascensus Put Together a Distinct Set of Topics to Suit Each Audience

One common mistake when it comes to designing emerging and first-line leader programs is using the same topics for each. The challenge with this approach is that while current leaders may already have experience practicing some of the core people leadership skills and can immediately level up their skills by applying them on the job, emerging leaders don't. This makes it difficult to apply people leader skills since they don't yet have direct reports.

This is why it's important to design these programs a little bit differently. One advances already applied skills, while the other prepares you to transition into applying these skills. For this reason, Ascensus crafted two distinct curriculums.

A key element of both of these leadership series is the cadence of one topic per month. Reese said, “We decided to deliver one topic a month because too much speed and complexity puts people into a state of cognitive overload. Once a month fits with what people can absorb from both a cognitive perspective and a time perspective.”

### The Key to Scaling? A Blended Approach of Live Workshops, Micro-learning, and Nudges

To activate their curriculum and drive behavior change, they leaned on a blend of tech and group coaching. Their approach consisted of three key components:

**Micro-learning + nudges in the flow of work:** Reese said, “Ultimately, we were looking for a format that was scalable, cost-effective, meets learners where they are, and appeals to today's learners. Our associates are time-crunched. Offering a format that would enable participants to learn in the flow of work is what was most desired. Micro-learning is really important,

and learners want choices in how they engage with content, so we wanted to ensure we could offer a mix of methods such as on-demand videos, virtual workshops, book summaries, and coaching plans.” Cashdollar added, “The behavioral nudges baked into the program also help with feelings of overload because they're bite-sized, just in time, and act as a great point of reinforcement.”

**Group coaching in a ‘flipped classroom’ model:** The cadence (pictured in the section above) works like this: For three weeks, learners touch on core concepts that follow a monthly coaching plan and apply those learnings through micro-exercises. Then on week four, the cohort meets for a live group coaching session.

In the live group coaching session, the cohort wraps up the month’s learning facilitated by a seasoned expert. Participants share what they learned, how they applied key learnings on the job, what questions they had, and the challenges they faced. Holding the session after a month of learning and practice (instead of before) helps establish a clear finish line and motivates learners to complete the self-paced components.

Leaders Emerging at Ascensus Program (LEAP) for emerging leaders:



Months 1-6 of the 12-month emerging leaders program.

Foundations of Leadership (FOL) Program for first-line leaders:



Months 1-6 of the 9-month first-line leaders program.

**LiveCoach:** For their first-line leaders, Ascensus also enabled learners to message directly with an expert coach as needed. This is the scalable way to mirror the kind of high-touch, high-attention approach that executives get. “Since first-line leaders are already in real situations,” Reese said, “We added that availability for them to chat with the coach on-demand. That way, when a challenge or question comes up, they have support right then and there from a seasoned expert.”

In combination, these components recreate the high-touch, high-attention approach that drives success in so many director-level+ programs.

**Results: The Programs Engage Learners, Build Confidence, and Drive On-The-Job Application**

What happens when you successfully scale a high-touch, personalized approach to your first-line? You get excellent results.

Albert broke down the results they saw as follows:

Across two cohorts of the LEAP emerging leaders program, they saw:

- 92% of participants said their leadership confidence increased
- 92% of participants said they are APPLYING what they learned
- 87% usage of the platform
- 82% of ALL coaching exercises and micro-learnings were completed

Across two cohorts of the FOL first-line leader program, they saw:

- 85% of participants said their leadership confidence increased
- 92% of participants said they are applying what they learned
- 75% usage of the platform

Qualitatively, their feedback shows they’re accomplishing exactly what they wanted to achieve: On-the-job application.

**"The most helpful tool in this program was the on-hand resources to learn at my own pace and explore based on what I was dealing with at the time. I gained a lot of confidence in my ability and feel that I am leaving this program with hands-on experience."**

— LEAP participant

**"The feedback session was helpful. As I was delivering and communicating constructive feedback and addressing an issue, I was able to use the tools I learned in the feedback session to help me get through the situation I was in."**

— FOL participant

**"Thank you for this amazing opportunity. I am so humbled and grateful to have been included, and I will use these tools throughout the rest of my life!"**

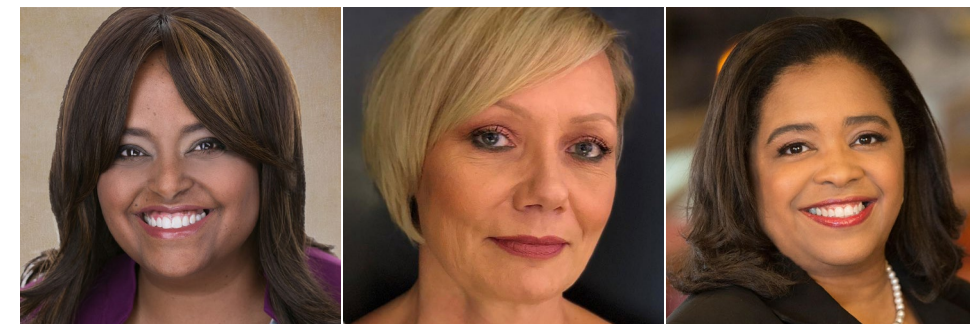
— LEAP participant

Feedback from FOL and LEAP program participants.

**Innovative Tech + Strategy = Scale**

Ascensus succeeded in scaling leadership development to their emerging and first-line leaders in a way that meets their workforce where they are today. This was achieved through the use of seasoned facilitators (group coaching) and strategic use of cutting-edge technology (micro-learning, nudges, and on-demand coaching). With all of these elements working together smoothly, Ascensus established a system of development that emphasized on-the-job application. ■

# The 30-Day DEI Challenge Denny’s Uses To Spark Behavior Change



Chief of L&D, Fasika Melaku Peterson (left) Director of Leadership Development, Raila Roinisalo (center), and VP, DE&I April Kelly-Drummond (right)

**Imagine waking up every morning for a month with a dedicated Diversity, Equity, and Inclusion (DEI) exercise. Your behavior would change fast. Now, imagine every employee at your company doing the same thing. Your culture would change fast.**

That’s the reality for the employees at Denny’s, the iconic diner-style restaurant chain known for its 24/7 operation. Today, they stand at 65,000 employees and 1450 restaurants, serving over 400 million breakfasts annually.

Spearheaded by their Chief of Learning and Development, Fasika Melaku Peterson, their Director of Leadership Development, Raila Roinisalo, and VP of DE&I April Kelly-Drummond, Denny’s has embarked on a pioneering DEI journey. Their 16-month DEI program, “Denny’s Together,” builds employees’ awareness and focuses on turning that awareness into on-the-job action.

Here’s how and why Melaku Peterson, Roinisalo, and Kelly-Drummond went about designing the “Denny’s Together” DEI program.

**A DEI Pulse Survey Highlighted the Opportunity for the ‘Denny’s Together’ Program**

Diversity, equity, and inclusion have long been critical to Denny’s, where they pride themselves on being “a diner for today’s America.”

That said, they only recently built out their 18-month program. Melaku Peterson said, “We are ‘a diner for today’s America.’ That means that we have to not only support, serve, and take care of our wide range of guests, but also do the same for our team members. After administering pulse surveys around DEI, we saw areas for improvement. We needed to make sure that Denny’s was a place where everyone felt like they belonged.”

Specifically, they saw that while employees valued DEI, they weren’t quite “getting to the top of the mountain.” Meaning, they struggled to move from awareness to action. In response, they designed the “Denny’s Together” program, which prioritized practice and on-the-job application.

## The Denny's 'Rules To Live By' Anchor the Program

Melaku Peterson, Roinisalo, and Kelly-Drummond started by establishing foundational ground rules of DEI. They called these their "Rules to Live By" at Denny's.



The Denny's Rules To Live By

"Change doesn't come without policy," Melaku Peterson said about the Denny's "Rules To Live By." "But," she added, "policy alone doesn't make learning sticky."

## Denny's Makes DEI Stick with a Long-Term, Action-Oriented Program

*We wanted to have an approach that really taps into people's natural compassion and curiosity. —Raila Roinisalo, Director of Leadership Development at Denny's*

To build a program that changed behavior and culture at Denny's, Melaku Peterson, Roinisalo, and Kelly-Drummond designed an 18-month program with four key phases. "To go beyond our usual thinking, beliefs, and experiences, and to create a place where everyone belongs and is seen, takes time," Melaku Peterson pointed out.

Here's a breakdown of each phase:

**Phase 1: Learning the "Rules to Live By."** Phase 1 focuses on education and awareness around the Denny's "Rules to Live By." They combine eLearning, videos, and more to create a blended experience. They tailor the content to specific audiences and their work.

**Phase 2: The 30-Day Challenge.** The daily agenda of the 30-day challenge moves learners out of passive learning and into habit-building through consistent practice. Melaku Peterson said, "The 30-day Challenge Workbook is physical and online. It contains 30 days of experiences, challenges, videos, and reflections." They also hold "Community Days" during the month, where the cohort gets together, celebrates, has fun, gets to know each other better, and discusses what they learned.

The month consists of daily challenges, each designed to expand your understanding, thought process, or perspective.

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	WEEKEND
<b>WEEK ONE</b> Creating a culture of belonging	Workplace Belonging	Empathy	Appearance Discrimination	Groups & Associations	Representation	Third Places
<b>WEEK TWO</b> It starts with YOU	Implicit Bias	Inclusion Language	Community Day	Affinity Bias	Cultural Competency vs. Cultural Humility	Explore a Culture
<b>WEEK THREE</b> A Place for All	Attribution Bias	Bias Blind Spots	Free Day	Mirroring	Micro-Affirmations	Social Responsibility
<b>WEEK FOUR</b> The Power of We	Allyship	Storytelling	Safe Environments	Your Authentic Self	You Did It!	

A high-level look at the 30-day challenge.

**Phase 3: Bold Conversations.** Bold Conversations is a two-day, cohort-based session where participants dig into how to communicate in a supportive way, grow their empathy and compassion, and listen to people's stories.

**Phase 4: Understanding Allyship.** Lastly, participants work on being active allies. After a one-day learning experience, they undergo a four-week reflection on allyship, getting into "what allyship looks like," "what does shared power look like," and "how to create a safe space for all."

The four phases don't take up the entire 18-month program. Instead, Melaku Peterson and Roinisalo leave space and time for reflection and practice.

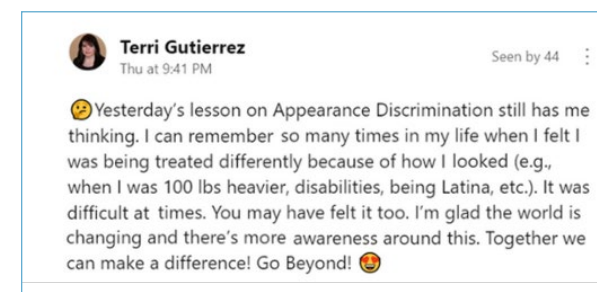
## Six Strategies Denny's Uses to Drive 80%+ Participation From ALL Employees

In its first year, Melaku Peterson and Roinisalo rolled the program out to all their 500 corporate employees—the Denny's Support Center Team Members. They saw an impressive 80%+ learner participation rate throughout the 1.5-year program.

When I asked Melaku Peterson, Roinisalo, and Kelly-Drummond what their secret was, they offered six strategies:

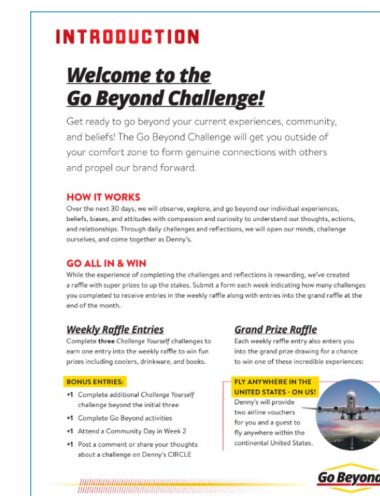
**#1 — Compelling and Relevant Content:** Instead of the typical one-and-done format, they took a more creative path. In addition to building out the content based on data from their pulse survey and leveraging the 30-day challenge format, they also emphasized making the learning personal and connecting it to each person's greater purpose. Melaku Peterson said, "Solicit opinions, connect your training to people on a personal level, and connect it to something that's not business."

**#2 — Social Sharing:** Denny's built and used their own digital platform for reflection, conversation, and peer learning. Called "Denny's Circle," the platform drew strong engagement and grew in membership from 130 employees to 300 (out of 500 total).



Sample participant reflections on the Denny's Circle platform.

**#3 — Prizes:** Denny's gave prizes to employees who participated up to a certain threshold. You could enter the raffle if you completed three out of five exercises for the week. And employees who exceeded the threshold or did bonus entries could earn extra raffle tickets. Prizes included two tickets anywhere in the US, lunch with the CEO, lunch with various executive team members, coolers, t-shirts, and more.



Sample page from the Go Beyond workbook showing participation prizes.

**#4 — Champions:** Denny's recruited "Go Beyond Champions" to help at events, facilitate conversations, and serve as DEI council members.

**#5 — Mid-month Celebration:** Halfway through the 30-day challenge, participants got together and celebrated. They also signed a "Go Beyond" banner that hung in their workspace throughout the month.



Go Beyond banner signing.

**#6 — End of the Month Celebration:** To cap off the thirty-day challenge, they held another community day celebration where participants shared “Authentic Self” stories, reflected, and recorded video testimonials about the program for future participants.

**Five Lessons Denny’s Learned as They Designed and Delivered the Program**

Many companies have DEI programs, but it’s rare to find companies doing 1.5-year programs. It’s even more rare to find programs so adept at driving behavior change.

For anyone looking to revamp, revitalize, or build a DEI program from scratch, I asked Melaku Peterson, Roinisalo, and Kelly-Drummond about their most powerful lessons learned. They offered five pieces of advice:

**1 Executive Buy-in Is Foundational, Not Secondary.**

“DEI is a massive effort,” Roinisalo said, “so make sure you have firm CEO commitment.” When they started their journey, they already had strong support from their CEO, CFO, and Chairwoman.

**2 Understand Your Current Culture.**

“If you don’t understand what your culture is today, dig into it first,” Melaku Peterson said.

**3 Trust & Psychological Safety.**

Do work to build trust at the program’s outset. Melaku Peterson said, “If I would do anything different for this program, I would have spent more time, in the beginning, explaining what this was, and why it was, why we would want it to be safe, and how to make it safe for everyone throughout.”

**4 Gain Full Commitment from Participants.**

“If participants come to you saying that a 30-day commitment is too long, then they aren’t truly committed,” Melaku Peterson pointed out. This high standard for participation set a strong, committed tone that drove the program forward.

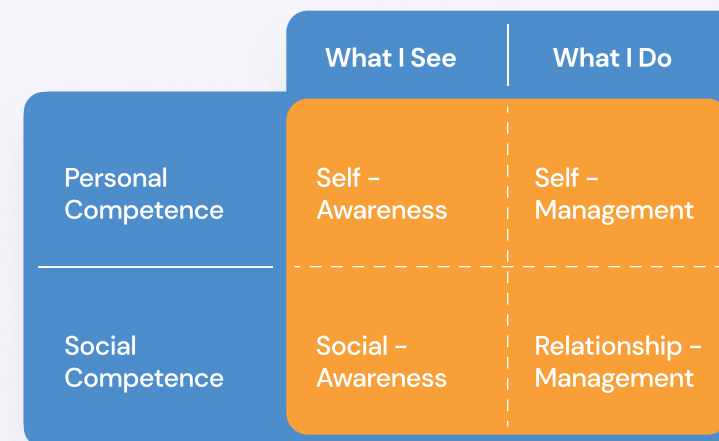
**5 Ingrain DEI into Everything.**

Kelly-Drummond said, “Our commitment to diversity is deeply ingrained into everything we do at Denny’s. That’s why when we say we’re feeding the mind, body and soul, we take a holistic approach to creating a workplace culture and restaurants that are welcoming to everyone. Our investment in education and combatting hunger are all integrated into our core strategies of living up to our role as America’s Diner.” ■



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**Dr. Travis Bradberry,**

Author of Emotional Intelligence 2.0 and CPO at LEADx



## RESEARCH

# The Six Top Priorities From The 2023 LinkedIn Learning Report

**L**&D professionals have never been better positioned to help their organizations thrive through change and uncertainty. This is a key theme from LinkedIn's 2023 Workplace Learning Report, entitled "Building the Agile Future."

"The challenges of global disruption, skills shortages, and economic uncertainty persist," the report reads. "Tackling tough problems requires new and better skills, and *learning* is the way through."

The report, which includes survey data from C-suite executives and L&D pros alike, highlights growing alignment between learning initiatives and business strategy. More than 80% of organizations want to build a more people-centric culture, and they report that L&D is playing a huge role in making this a reality.

"More than ever, learning and development professionals have to be change agents," says Rachel Richal, vice president of training at Buffalo Wild Wings and president of the Council of Hotel and Restaurant Trainers.

To thrive through change and uncertainty, the 2023 report highlights six key priorities for L&D professionals. Here's a quick breakdown of each as well as practical examples and strategies from my own interviews with elite L&D professionals.

## Invest in Cross-Functional Relationships

Fostering relationships across departments is good for ALL business functions, not just L&D. When people interact with those outside of their immediate teams, it creates opportunities for innovation and creative problem-solving. Since mapping learning to business goals is L&D's top priority in 2023, collaboration across departments is especially critical. Investing in these cross-functional relationships will help

L&D set goals and build training programs to meet the specific needs of those departments. While more than 70% of L&D pros say their role became more cross-functional in the past year, there's still room for improvement.

"Hiring" or partnering with other leaders is one way L&D can strengthen ties across the organization. Richard Winters, an emergency room doctor at Mayo Clinic Care Network serves as a perfect example. As Dr. Winter climbed the ranks from emergency physician to President of the Medical Staff, he realized that leadership enabled him to expand his impact beyond single patients at the bedside to providing care to entire populations of patients. Having the perspective of other department leaders close at hand helps L&D create more engaging and valuable learning opportunities across different audiences.

## Hone Your Focus and Prioritize Your Strategy

L&D professionals already have a lot on their plates. But, as the 2023 report states, "this year is an opportunity to prioritize and be thoughtful about delivering people-centric impact." The best way to do so is by creating a strategic plan for L&D that aligns with company strategy.

One of the best ways to focus and prioritize your strategy is to create a strategic plan. A more structured plan can help you stay focused on what matters, clearly communicate your strategy to generate buy-in from senior leadership, and, ultimately, achieve your goals. Matthew Painter Ph.D., and Director of Leadership Development at UAB Medicine, recognized the need for a strategy to guide his efforts early on. He constructed a six-step process for L&D strategic planning that takes short- and long-term improvement into consideration. "Short-term, I asked: How can we optimize what we're already doing? Are we doing things right?" said Painter. "Long-term, I asked: Are we positioned for sustain-

able impact? Are we doing the right things? It doesn't matter if we're doing them right if we're not doing the right things."

Armed with a thoughtful strategy, L&D can prioritize and focus their efforts on what matters most for business success.

## Champion Diversity, Equity, and Inclusion

Only 55% of L&D pros say they own or share ownership for DEI programs—the same as in 2022. To ensure everyone in the organization feels included and is offered equitable opportunities, L&D must engage deeply with DEI efforts in an ongoing and sustainable way.

No one understands this better than Janessa Cox-Irvin, global head of diversity & inclusion at AllianceBernstein. "We see D&I purely as a strategy, not a program," said Cox-Irvin. "There are programmatic pieces to it, but a program indicates a beginning and an end. D&I strategy work is very much iterative. There's always something new and interesting on the horizon that we need to be prepared to tackle and to take hold of. When we look at it from a strategy perspective, we're looking at it from hiring, we're looking at it from what we call accountability at all levels."

## Practice Data-Informed L&D

Over the last decade, L&D has taken strides to measure program effectiveness and to use this data to make decisions. But the 2023 report shows L&D still relies too heavily on vanity metrics like employee satisfaction and program attendance to demonstrate impact.

While many L&D pros still don't have the resources to make their programs truly data-driven, they can make them data-informed. For example, L&D could build training programs around the specific behaviors that most affect engagement based on employee engagement survey data (i.e., one-on-one conversations). The key is to simply start.

## Activate Your People Managers

When I ask L&D professionals how they go about increasing learner engagement, engaging managers is the number one tactic they cite as being most effective. And yet manager sponsorship is often a missing ingredient in L&D strategy. Here are a couple of examples you can emulate to activate your people managers.

In Adobe's Leadership Circles program, managers are brought along at every stage of the process to help translate learning into action. "Periodically, I update the people managers on what we've covered, what's to come, and how they can continue supporting their employees who are participating in Leadership Circles," said Angela Szymusiak, director DE&I talent development at Adobe. "We also ask the participants to give monthly updates to their managers and share what they learned, how they can apply it, and how their manager can help."

At AllianceBernstein (AB), when their leadership development team heard that managers were struggling to offer career guidance to employees, they sprang into action. The team created an actionable Career Conversations guide, based on the internally developed PATH framework. The program included training for employees in how to think about their careers, and it included training for managers to better facilitate these career conversations. Then, employees and their managers worked through an agenda of real manager-employee meetings.

## Prioritize Your Own Learning

When your entire role is devoted to developing others, it's easy to let your own development fall by the wayside. But the 2023 report reminds L&D pros to make time for their own learning, likening it to "putting on your own oxygen mask before helping others." As L&D continues mapping its strategy to business goals, it's important to develop new skills that will improve programming. Topics like data analytics, process improvement, and new technologies (like nudges and micro-learning) will help you stay relevant in L&D.

One of the best ways to learn new skills is in a community with peers. Meeting with peers facing similar challenges offers the opportunity to:

- ask questions
- discuss ideas, insights, solutions, and stories
- learn from each other's mistakes

## L&D Catalyzes Innovation in 2023

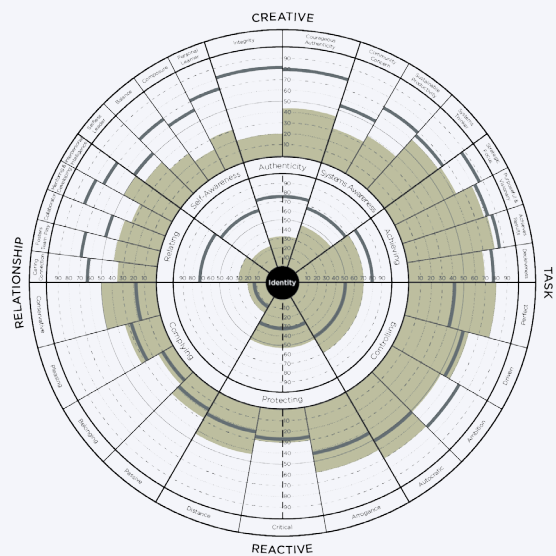
Armed with the right priorities, the outlook is positive for L&D to be a catalyst for innovation and improvement in 2023.

Which of the six priorities above resonates most with you? Which do you find most exciting, and most challenging? ■



Assess and Train For Lasting Change

# Leadership Circle Profile (LCP 360)



Help your managers deeply assess their leadership. Then turn their results into lasting growth:

- ✓ Send personalized nudges based on your learners' LCP 360 results
- ✓ Reinforce learning with micro-learning videos, book summaries, and exercises
- ✓ Deliver elite coaching: One-on-one, group, and text-to-coach

"Users like that the on-demand coaching and tips are right in the palm of their hands."



**Alisa Miller**  
CHRO, IAT Insurance Group



# Scale **Elite-Quality** Coaching to Every Level



# New Research: Women More Effective Than Men In All Leadership Measures



Cindy Adams, President and CLO at Leadership Circle

**In 2023, for the first time in history, women CEOs lead about 10% of Fortune 500 companies. This is undoubtedly an important milestone. But it also underscores the need for more women at all levels of leadership.**

And this is not just about representation. Women leaders are good for business:

- *The Ready-Now Leaders* report from the Conference Board shows that organizations with at least 30% women in leadership roles are 12x more likely to be in the top 20% for financial performance.
- Research from Leadership Circle, based on assessments with over 84,000+ leaders and 1.5 million raters (comprising boss, boss's boss, peers, direct reports, and others), shows that female leaders show up more effectively than their male counterparts across every management level and age level.

Creating a pipeline for women leaders is a business issue. IBM's report this year states that "Women remain acutely underrepresented in the middle management tiers, jeopardizing prospects for a healthy pipeline of future women leaders." So, how can you best develop a pipeline of female leaders to drive equitability and bottom-line results?

First, it helps to understand what exactly makes women more effective leaders. And who could better break down the research than Cindy Adams, President and CLO at Leadership Circle? Adams was at the helm of Leadership Circle's new study, which offers insights into the differences in leadership impact between male and female leaders. She is passionate about using this data to help women advance in leadership roles.

## The Feminine Leadership Advantage: How Women Outscore Men In Leadership Effectiveness

The research that Adams led at Leadership Circle is from the Leadership Circle Profile, a scientifically validated 360-degree assessment of leadership that measures "Creative Competencies" and "Reactive Tendencies."

"Creative leaders' behaviors flow from their values and purpose," Adams said, "rather than from a set of assumptions about how leaders are supposed to behave." Creative Competencies are highly researched and validated effective leadership competencies around the world. These include competencies that scale across five dimensions:

1. Relating
2. Self-awareness
3. Authenticity
4. Systems Awareness
5. Achieving

Reactive Tendencies, on the other hand, are tendencies that "got us here, but won't get us there," Adams said. "The reactive structure of 'beliefs and assumptions' are designed to keep us safe or to protect a sense of worth. But, they contain self-limiting beliefs and behaviors that hold leaders back from achieving their full potential." Reactive leaders rely heavily on early life scripts of what leaders are supposed to do and say, which often leads to autocratic micromanaging. The three reactive dimensions include:

1. Complying
2. Protecting
3. Controlling

Based on Leadership Circle's growing database of more than 240,000 complete leadership profiles, Adams highlighted three key advantages that research indicates contribute to female leaders being more effective than male leaders.

1. **Women score significantly higher on all five Creative Dimensions:** Women leaders score significantly higher in their capability to "connect and relate to others," as well as in the Authenticity and Systems Awareness competencies. This suggests that women leaders are not only better at building relationships but also that the relationships they build are characterized by authenticity and an awareness of how they contribute to "the greater good beyond the leader's immediate sphere of influence."
2. **Women are more likely to lead from a Creative mindset and "play for all to win":** Adams wrote, "Female leaders more often lead from a 'playing to win' orientation—focusing on their natural curiosities about what matters most to the future they are creating and partnering with others to move toward that vision. Male leaders can and do also lead from this orientation, but they are just as likely to lead from a 'play not to lose' orientation and may spend as much time moving away from what they don't want as moving toward what they do."
3. **Women build and cultivate stronger connections:** Adams said, "Female leaders show up in a noticeably different way than male leaders in terms of building caring connections, mentoring and developing others, and exhibiting concern for the

community. In today's business environment, this acts as a superpower."

"In a nutshell," Adams said, "female leaders demonstrate higher levels of leadership effectiveness and higher levels of Creative competency (in all dimensions), and they demonstrate lower Reactive impact compared to their male counterparts."

Despite all the measurable benefits female leaders bring to organizations, many still do not effectively develop and support them.

## How To Develop Women Leaders To Harness the Feminine Leadership Advantage

*"If you're not forging a path in your company to make leadership more inclusive or leveraging the full power and potential of women in leadership, then you're not doing all you can for the success of your organization."*  
— Cindy Adams, chief learning officer at Leadership Circle

To harness the feminine leadership advantage, Adams points out that simply hiring more women isn't enough.

"Diversity in leadership ranks is proven to have a strategic advantage," Adams emphasized. "It's important to not only hire and promote female leaders but to encourage their development early and to help them gain as much business experience and knowledge as they can in roles that may still be male dominated."

Perhaps the single best way to develop a strong pipeline of female leaders is to build a Women in Leadership program. What follows are four key elements to enable a successful program.

### 1. FOCUS ON "AUTHENTIC SELF-ADVOCACY"

Leadership Circle's data reveals that, despite female leaders showing up more effectively than male leaders, they underestimate their skills and influence to a greater extent than male leaders. Female leaders are also "overloaded and overcommitted" to a higher degree than their male counterparts.

To Adams, this points to the need for women to learn how to see themselves authentically and to learn how to talk about their strengths and advocate for themselves. For example, the first several months of Adobe's women-in-leadership training program focus on personal leadership practices intended to empower up-and-coming women leaders. Participants explore questions like:

- What are your superpowers? What are your unique talents and strengths? How can you amplify them and bring them to the organization?
- What are your values?
- Who can be on your personal board of directors to support your success?
- How can you maximize your time for greater impact?

Emphasis on authentic self-advocacy helps narrow the gap between women's measurable effectiveness and their self-perception.

## 2. LEAN ON COHORT-BASED LEARNING AND PEER LEARNING

Learning is much more likely to “stick” when it happens in a community of like-minded people. Adobe's program, for example, leverages “Mastermind” groups of four to six women participants, in which they can peer coach and dive deeper into what they're learning. Cohort-based learning emphasizes networking and relationship-building, which are especially vital in remote and hybrid work environments. A cohort-based approach can help create an ongoing network of support that extends far beyond the period of your program.

## 3. LEVERAGE EXECUTIVE COACHES TO PERSONALIZE GROWTH AND SUPPORT

In a one-on-one coaching relationship, women leaders can get personalized support as they navigate their growth and development. The pharmaceutical company Endo prioritizes coaching in its “ASPIRE” program for women in leadership. “I've seen the power of pairing strong female talent with strong female coaches,” said Patrick Barry, EVP and president of global commercial operations at Endo. “So, I helped build ASPIRE to formalize the pairing of female talent with coaches.”

Similarly, Adobe weaves executive coaching into the fabric of its women-in-leadership program. At Adobe, executive coaches are involved not only as one-on-one support for participants but also in conversations with participants' managers. This helps deepen the coaches' impact and involve the participants' managers more directly.

## 4. BRIDGE THE “KNOWING-DOING GAP” WITH APPLICATION EXERCISES AND MANAGER ENGAGEMENT

Providing leaders opportunities to practice, experiment, and apply new beliefs and skills is the best way to translate “learning” into “doing.”

At Adobe, participants move into breakout groups immediately after a new concept has been introduced. Breakout sessions offer participants the opportunity to reflect and discuss how they'll put new learnings into practice and answer questions like:

- How will I use this concept?
- What will it look like?
- What questions do I have?

Adobe is also intentional about engaging participants' managers in the process. “We ask the participants to give monthly updates to their managers and share what they learned, how they can apply it, and how their manager can help,” said Angela Szymusiak, director of DE&I talent development at Adobe. “Encouraging participants to engage their managers throughout this experience helps ground their learning and makes it practical, relevant, and valuable in their day-to-day jobs.”

## Start Developing Your Women Leaders NOW

No matter the design, content, or length of a leadership development program, Adams says it's crucial to start early—for the benefit of future women leaders and the organization at large.

“Women, in particular, make that shift from ‘less effective’ to ‘more effective’ sooner than men,” says Adams. “If we start building more diverse teams and organizations now, businesses will be better for it, and the world will be better for it today and ten years from now.” ■

# THE OFFICIAL LEADx COURSE CATALOG

Here are 56 LEADx courses broken down into four categories:

Leading Yourself

Leading Others

Leading An Organization

Self-Awareness

- Self-paced in-the-flow-of-work learning (4 activity and 12 activity learning paths are available).
- 50 to 90-minute live group coaching sessions. Use LEADx facilitator or license a train-the-trainer kit.



# Leading Yourself

## LEARNING OBJECTIVES

## MICROLEARNING

### Accountability

Accountability is a critical leadership skill that promotes ownership, trust, performance, collaboration, learning, and motivation. By creating a culture of accountability, teams can work together more effectively and achieve their goals successfully.

By the end of this coaching plan, participants will learn:

- How taking accountability helps to achieve goals.
- Develop good team accountability practices.
- Discuss the importance of accountability with team members.

- Read the book summary, *The Wisdom of Oz* by Roger Connors.
- Take the Accountability assessment.
- Discuss the challenges and rewards of accepting accountability with your team.
- Reflect on your experience.

### Active Listening

Active listening allows leaders to gain a deeper understanding of their team's needs, concerns, and ideas. When leaders listen actively, they can better comprehend the underlying motivations and perspectives of their team members, which can help them to make more informed decisions.

By the end of this coaching plan, participants will learn:

- Ways to improve body language and make eye contact.
- How to strengthen active listening skills.
- How to create a listening culture.

- Complete the *Active Listening* course with Dr. Naphtali Hoff.
- Are you an Active Listener? Take the self-assessment.
- Apply your Active Listening skills.
- Reflect on your experience.

### Agility

Agility and adaptability are critical for leaders who operate in fast-paced, dynamic, or uncertain environments, as they can help them stay ahead of the curve and navigate complex challenges with confidence. Leaders who are agile and adaptable can adjust their strategies, priorities, and actions in real-time to stay aligned with their objectives and keep their teams focused and motivated.

By the end of this coaching plan, participants will learn:

- How to apply agility to projects or decisions.
- How to talk with their team about agility and adaptability.
- How to build a culture of experimentation.

- Read the book summary, *Strategic Doing*
- Practice "ideation" skills on a problem or decision.
- Listen for inflexible mindset triggers.
- Reflect on your mindset.

### Communication Fundamentals

Effective communication skills are paramount for a leader in any organization, serving as a cornerstone for successful leadership. They enable leaders to articulate their vision clearly and persuasively, inspiring and motivating their team towards achieving organizational goals.

By the end of this coaching plan, participants will learn:

- What type of communication mindset they have.
- How to hold effective one-on-one meetings.
- How to communicate in a way that drives employee engagement higher.

- Watch the video *Communication for Employee Engagement*.
- Talk to your team about communication.
- Hold one-on-one meetings with your team.
- Reflect on your experience.

### Communication: Verbal Minimizers

Minimizing language can make a leader appear less confident, less sure of themselves, and less certain about their message. It can also make it difficult for others to take them seriously and may create confusion or misunderstanding.

By the end of this coaching plan, participants will learn:

- How to quiet self-doubt.
- To pay attention to when they are using minimizing language.
- How to create reminders to not use minimizing language.

- Read the book summary *Playing Big* by Tara Mohr.
- How are you minimizing your language? Take the Self-Assessment.
- This week, before each meeting, resolve to use powerful verbal language.
- Reflect on your experience.

## LEARNING OBJECTIVES

## MICROLEARNING

### Confidence Building

Self-confidence is critical to leadership because it enables leaders to make decisions, take risks, set goals, handle challenges, and inspire others. Without self-confidence, leaders may struggle to lead effectively and make a positive impact on their team or organization.

By the end of this coaching plan, participants will learn:

- How to stop negative self-talk.
- Developmental activities to build confidence.
- Habits to develop that build confidence.

- Watch *The Skill of Self-Confidence* TEDx Talk.
- Take the assessment to find out if you have Impostor Syndrome.
- Practice behaviors that take confidence and courage.
- Reflect on your experience.

### Customer Focused

Being customer focused is crucial for leaders because it helps them understand the needs and preferences of their target audience, which is essential for developing products, services, and strategies that meet their expectations. By prioritizing the customer experience, leaders can build a loyal customer base and increase their revenue and profitability.

By the end of this coaching plan, participants will learn:

- How to identify areas for improvement.
- How to create a customer-focused culture.
- How to make and keep your customers satisfied.

- Customer focused self-reflection.
- Read the book summary, *The Customer-Centered Enterprise*.
- Research what your internal or external customers really want.

### Diversity, Equity, & Inclusion

Valuing diversity is important for leaders because it brings a range of perspectives, experiences, and ideas to the table. A diverse team can foster creativity and innovation, as well as help identify blind spots and biases that may exist.

By the end of this coaching plan, participants will learn:

- To explore how different aspects of social identity can provide both obstacles and benefits.
- To improve their use of inclusive terms.
- To become aware of unconscious bias.

- Listen to the podcast episode *Confront Your Biases*.
- Complete the "Privilege Self-Reflection" assessment.
- Focus on unconscious bias in your communication, especially your use of pronouns.
- Reflect on your experience.

### Growth Mindset

A growth mindset is important for a leader because it allows them to embrace challenges, learn from failures, and develop new skills and abilities. A growth mindset is the belief that one's abilities and intelligence can be developed through hard work, dedication, and perseverance.

By the end of this coaching plan, participants will learn:

- The difference between a "growth" mindset and a "fixed" mindset.
- How to develop a growth mindset.
- Activities to build a growth mindset.

- Read the book summary *Mindset* by Carol Dweck.
- Do you have a growth mindset? Take the self-assessment.
- Apply your growth mindset.
- Reflect on your experience.

### Influence Without Authority

Influence without authority is an important skill for leaders because it allows them to achieve their goals and objectives by working effectively with others, even in situations where they may not have direct control or authority.

By the end of this coaching plan, participants will learn:

- How to effectively build relationships, identify what people actually want, and make effective mutual trades.
- What style of influence they have.
- Activities to become stronger in influence and persuasion.

- Read the book summary *Influence without Authority*.
- What's your influence style? Take the self-assessment.
- This week, apply your Influencing without Authority skills.
- Reflect on your experience.

## LEARNING OBJECTIVES

## MICROLEARNING

**Personal Branding**

Building a personal brand is crucial for leaders because it helps establish their reputation, values, and expertise in the minds of their audience, whether it's employees, customers, or investors. By consistently conveying their unique message and vision, leaders can differentiate themselves from their competitors and create a loyal following.

By the end of this coaching plan, participants will learn:

- How to define their personal brand.
- How to identify strengths and skills.
- How to use unique qualities to stand out.

- Read the book summary, *Crushing It!*
- Watch the video, *Stand Out* with Dorie Clark
- Explore blockers to building your personal brand.

**Productivity**

Increasing productivity is a valuable leadership skill that can benefit both the leader and their team. Learning to prioritize tasks and focusing on what matters most can lead to better decision-making and problem-solving.

By the end of this coaching plan, participants will learn:

- How their personality impacts productivity.
- How to block MIT time.
- How to better manage their email inbox.

- Read the book summary, *The One Thing*.
- Watch the video, *Minimize Reactive Attention*.
- Watch the Course, *Minimize Meetings*.

**Resilience**

Resilience is crucial for leadership development as leaders are often faced with challenging situations and unexpected setbacks that require them to bounce back quickly and maintain their focus and determination.

By the end of this coaching plan, participants will learn:

- Their current level of resilience.
- Habits to build resilience.
- Five key drivers of resilience.

- Take the Resilience assessment, read report.
- Watch the *Habits of Resilient Leaders* video from Mayo Clinic.
- Strengthen one resilience driver this week.
- Reflect on your experience.

**Results Focused**

Being results-focused is an important aspect of leadership because it helps you to stay focused, motivated, and productive, and it enables you to deliver the desired outcomes for your team and organization.

By the end of this coaching plan, participants will learn:

- How to remove distractions in order to focus on goals.
- Behaviors for aligning team members' skills to tasks required to achieve objectives.
- How to talk to team members about being results focused.

- Read the book summary *The 4 Disciplines of Execution* by Chris McChesney.
- Are you results focused? Take the self-assessment.
- Talk to your team, or manager, about staying focused on results.
- Reflect on your experience.

**Risk Taking**

Risk taking is an essential component of leadership as it encourages leaders to step out of their comfort zones, challenge the status quo, and embrace new ideas and opportunities. Effective leaders must be able to assess risks and make informed decisions, often in the face of uncertainty and ambiguity.

By the end of this coaching plan, participants will learn:

- How to step outside their comfort zone.
- How to become more comfortable with uncertainty and taking risks.
- Ways to build risk-taking skills.

- Watch Dr. Tina Seelig's TED Talk: *Little Risks*
- Read the book summary: *Thinking in Bets* by Annie Duke.
- Complete the Risk List.
- Flex your risk taking skills.

## LEARNING OBJECTIVES

## MICROLEARNING

**SMART Goals for Yourself**

SMART goals provide clarity and specificity to the goals leaders set for themselves and their teams. This helps leaders focus their attention on achieving what matters most, while avoiding distractions and unproductive activities.

By the end of this coaching plan, participants will learn:

- How to stay focused and achieve their objectives.
- Areas for improvement in goal setting processes.
- How to track progress when working on goals.

- Read the article, *Overview to SMART Goals*.
- Take the assessment to find out how effective you are at goal setting.
- Put your knowledge into practice. Set one SMART Goal for yourself.
- Reflect on your experience.

**Women in Leadership: Confidence Building**

Confidence is crucial for women leaders, particularly in environments often dominated by male leadership, as it reinforces their credibility and competence. This also helps to challenge and gradually shift deep-seated gender norms, paving the way for a more inclusive and balanced leadership environment.

By the end of this coaching plan, participants will learn:

- If they suffer from Imposter Syndrome and how to stop it.
- If they are risk avoidant.
- How to take more risks and avoid people-pleasing.

- Reading the book summary *The Confidence Code*.
- Taking the confidence quiz.
- Completing the Risk List worksheet.

**Women in Leadership: Networking**

By cultivating relationships across different levels and areas of their organizations, women leaders can gain a broader perspective and make more informed decisions. Ultimately, building and leveraging relationships is critical for women leaders to build their influence, advance their careers, and create positive change in their organizations and communities.

By the end of this coaching plan, participants will learn:

- How to improve their networking skills.
- Why networking is important.
- Steps to expand their network.

- Listening to the podcast, *Networking Made Simple and Easy*.
- Read the book summary, *Taking the Work Out of Networking*.
- Complete the Pay It Back worksheet.

**Women in Leadership: Personal Brand**

Making their work visible is important for women leaders because research has shown that women often face systemic biases and stereotypes that can lead to their contributions being overlooked or undervalued. Ultimately, making their work visible is critical for women leaders to create a positive impact and achieve their full potential in their roles.

By the end of this coaching plan, participants will learn:

- How to break bad habits that keep women from moving up in their careers.
- Create their Elevator Story.
- Ways to highlight their achievements.

- Read the book summary, *How Women Rise*.
- Create a Top 50 list of contacts.
- Complete the Elevator Story worksheet.

**Women In Leadership: Powerful Presence**

Research has shown that women are often subject to gender stereotypes that can lead to them being perceived as less authoritative or competent than their male counterparts. By cultivating a powerful presence, women leaders can overcome these biases and establish themselves as credible and effective leaders.

By the end of this coaching plan, participants will learn:

- How power posing can boost your confidence.
- How to stop using diminishing body language.
- How to use powerful verbal language.

- Read the book summary, *Playing Big*.
- Complete the Minimizing Language self-reflection.
- Watch the webinar, *5 Star Communication Secrets*

# Leading Others

## LEARNING OBJECTIVES

## MICROLEARNING

### Accountability for Teams

As a leader, one of the most critical responsibilities is to ensure that team members are accountable for their actions and decisions. Accountability is the foundation of trust and teamwork, and it is essential for achieving organizational goals. Leaders must set clear expectations, establish performance metrics, and provide regular feedback to team members.

By the end of this coaching plan, participants will learn:

- The tools and tips of supportive accountability.
- Good team accountability practices.
- To routinely discuss the importance of accountability with team members.

- Read the book summary *Supportive Accountability* by Sylvia Melena.
- How strong is your accountability process with your team? Take the assessment.
- Discuss the challenges and rewards of accepting accountability with your team.
- Reflect on your experience.

### Autonomy

Autonomy is important for teams because it empowers them to be more creative, flexible, and innovative. It encourages collaboration and ownership, which can lead to better performance and job satisfaction.

By the end of this coaching plan, participants will learn:

- The 80% rule for delegation.
- Strategies to empower your team to work autonomously.
- How to create a culture of autonomy.

- Watch the video, *Autonomy*.
- Take the assessment to determine if you effectively empower others to work autonomously.
- Practice developing effective habits to foster a culture of autonomy.
- Reflect on your experience.

### Behavioral Interviewing

Behavioral interviewing can help employers make more informed hiring decisions and reduce the risk of hiring the wrong candidate. By assessing a candidate's past behavior and performance, employers can gain insights into how they might perform in the role and whether they would be a good fit for the organization's culture and values.

By the end of this coaching plan, participants will learn:

- How to conduct an objective behavioral interview.
- To evaluate job candidates based on data and skills.
- How to use topgrading practices for hiring, training and promoting.

- Watch the Behavioral Interviewing & Selection video course.
- Read the book summary, *Topgrading*, by Dr. Bradford Smart.
- Recruit colleagues or friends to complete 3 practice interviews.
- Reflect on your experience.

### Care

Showing your team members that you care is crucial as a leader because it helps to build strong relationships with your team and fosters a sense of trust and loyalty. When team members feel that their leader genuinely cares about their well-being, they are more likely to feel valued and respected, which in turn can lead to increased job satisfaction and motivation.

By the end of this coaching plan, participants will learn:

- Habits that invite social connections and show support.
- Strategies that show their team members they care and are interested in them.

- Watch the video, *Care*.
- Take the assessment to find out how well you show your team you care about them.
- Practice developing habits that show your care and interest in others.
- Reflect on your experience.

## LEARNING OBJECTIVES

## MICROLEARNING

### Career Development

Investing in the career development of team members is not only beneficial for the individuals themselves, but also for the team and organization as a whole. It can lead to improved job satisfaction, increased loyalty and commitment, enhanced performance, and better succession planning.

By the end of this coaching plan, participants will learn:

- To develop and implement career development practices for their team members.
- To identify high-potential future leaders.
- To hold conversations with their team members about career development.

- Watch the video, *Career*.
- Take the self-assessment to explore how you drive your team members' career development.
- Practice developing habits to support your team members' career goals.
- Reflect on your experience.

### Change Management

In today's rapidly evolving global market, organizations must be able to adapt and respond quickly to changing circumstances to remain competitive and relevant. Leaders who can effectively lead change are better equipped to guide their teams and organizations through periods of uncertainty and transition.

By the end of this coaching plan, participants will learn:

- How to apply the "8 accelerators" to drive change.
- How to improve skills in the areas of agility, ambiguity, and change.
- How to influence and motivate others to embrace a change journey in a positive and productive manner.

- Watch the video *8 Steps to Drive Change*.
- What are your beliefs about change? Take the self-assessment.
- Apply the 8-Step Kotter model to a key initiative.
- Reflect on your experience.

### Communication: Teams

Two-way communication is a critical leadership skill that allows leaders to build trust and establish strong relationships with their team members. In a two-way communication process, leaders not only convey information, but they also listen actively to their team members' feedback, concerns, and ideas.

By the end of this coaching plan, participants will learn:

- How to encourage information sharing.
- Strategies to communicate effectively.
- Ways to strengthen communication skills.

- Watch the video, *Two-way Communication*.
- Take the Self-Assessment to find out how you practice two-way communication.
- Practice developing habits to communicate effectively with others.
- Reflect on your experience.

### Critical Conversations

Effective communication is a cornerstone of good leadership, and being able to have difficult conversations is an important aspect of effective communication. By knowing how to have these conversations effectively, leaders can address issues in a constructive and productive manner.

By the end of this coaching plan, participants will learn:

- To express their ideas and opinions and make other people feel safe enough to freely share their ideas and opinions.
- To effectively navigate critical conversations.
- The framework to have healthy, productive conversations.

- Read the book summary, *Crucial Conversations*.
- Reflect on a critical conversation you've had in the past.
- Use the Critical Conversations Job Aid to strengthen your communication skills.
- Reflect on your experience.

	LEARNING OBJECTIVES	MICROLEARNING
<p><b>Delegation</b></p> <p>Delegation is an essential skill for leaders who want to maximize their productivity, increase efficiency, achieve greater success for their organization, and build a stronger, more capable team.</p>	<p>By the end of this coaching plan, participants will learn:</p> <ul style="list-style-type: none"> <li>To delegate using the PACE model.</li> <li>To identify areas for improvement.</li> <li>Tips for delegating effectively.</li> </ul>	<ul style="list-style-type: none"> <li>Complete the <i>How to Delegate Effectively</i> course.</li> <li>Take the assessment to find out how well you delegate.</li> <li>Practice "Effective Delegation."</li> <li>Reflect on your experience.</li> </ul>
<p><b>Effective Feedback</b></p> <p>Giving and receiving feedback is a critical component of leadership development, and it is essential for building high-performing teams. Effective feedback can provide valuable insights into individual and team performance, and it can help identify areas for improvement and growth.</p>	<p>By the end of this coaching plan, participants will learn:</p> <ul style="list-style-type: none"> <li>Tips for giving effective feedback.</li> <li>How to use the B.I.G. model to give effective feedback.</li> <li>How to avoid common feedback mistakes.</li> </ul>	<ul style="list-style-type: none"> <li>Complete the <i>Effective Feedback</i> video course.</li> <li>What is your natural feedback style? Complete self-reflection.</li> <li>Practice giving both positive and constructive feedback.</li> <li>Reflect on your experience.</li> </ul>
<p><b>Employee Engagement</b></p> <p>Employee engagement is critical for leaders to ensure the success of their organization. Engaged employees are more productive, committed, innovative, and customer focused. They also contribute to a positive and productive organizational culture.</p>	<p>By the end of this coaching plan, participants will learn:</p> <ul style="list-style-type: none"> <li>The four drivers of employee engagement.</li> <li>How to inspire, motivate, and engage team members.</li> <li>Tips on how to boost employee engagement.</li> </ul>	<ul style="list-style-type: none"> <li>Complete the <i>Employee Engagement</i> video course.</li> <li>How well do you engage your team members? Take the self-assessment to find out.</li> <li>Choose 3 reminder strategies to consistently boost your team members' engagement.</li> <li>Reflect on your experience.</li> </ul>
<p><b>Future Vision</b></p> <p>Future vision is an essential component of leadership because it provides a roadmap for the organization's future growth and success. A clear and compelling future vision helps leaders to align their teams around a common purpose, focus their efforts on achieving strategic objectives, and anticipate and prepare for changes and challenges.</p>	<p>By the end of this coaching plan, participants will learn:</p> <ul style="list-style-type: none"> <li>How to develop visionary leadership habits.</li> <li>Strategies to effectively share a future vision that motivates others.</li> <li>Ways to become a better visionary leader.</li> </ul>	<ul style="list-style-type: none"> <li>Watch the video, <i>Future Vision</i>.</li> <li>How do you share a future vision to inspire others? Take the self-assessment.</li> <li>Practice developing habits for visionary leadership with your team.</li> <li>Reflect on your experience.</li> </ul>
<p><b>GROW Coaching</b></p> <p>Coaching is a powerful tool for developing individuals and teams, and it is essential for building a high-performing organization. GROW coaching is a popular coaching framework that is used by many successful organizations to facilitate personal and professional growth.</p>	<p>By the end of this coaching plan, participants will learn:</p> <ul style="list-style-type: none"> <li>The GROW model of coaching.</li> <li>Tips on coaching from top executive coaches.</li> <li>How to use effective questioning and active listening techniques in coaching.</li> </ul>	<ul style="list-style-type: none"> <li>Complete the <i>Coaching with G.R.O.W.</i> video course</li> <li>Take the Coaching Mindset Self-Reflection Quiz.</li> <li>Start GROW Coaching your team.</li> <li>Reflect on your experience.</li> </ul>

	LEARNING OBJECTIVES	MICROLEARNING
<p><b>Meeting Efficiency</b></p> <p>Meeting effectiveness is essential for achieving organizational goals, enhancing collaboration, and driving productivity. Effective meetings save time for everyone involved and improve decision-making by providing a platform for discussion, debate, and the exchange of ideas.</p>	<p>By the end of this coaching plan, participants will learn:</p> <ul style="list-style-type: none"> <li>Key strategies to having effective meetings.</li> <li>How to use a meeting checklist to keep meetings on track.</li> <li>Tips for creating inclusive meetings.</li> </ul>	<ul style="list-style-type: none"> <li>Read the book summary <i>The Surprising Science of Meetings</i>.</li> <li>Watch the webinar <i>Extraordinary Meetings</i> by Paul Axtell.</li> <li>Get ready for your next meeting with a meeting preparation checklist.</li> <li>Increase inclusivity with these tips for creating inclusive meetings.</li> </ul>
<p><b>One-on-one Meetings</b></p> <p>One-on-one meetings are an essential tool for building effective relationships and communication between leaders and their team members. These meetings provide an opportunity for leaders to offer feedback, guidance, and support, as well as establish accountability and foster engagement.</p>	<p>By the end of this coaching plan, participants will learn:</p> <ul style="list-style-type: none"> <li>Tips for effective one-on-one meetings.</li> <li>How your personality can affect your approach to one-on-one meetings.</li> <li>How to follow a proper one-on-one meeting agenda.</li> </ul>	<ul style="list-style-type: none"> <li>Complete the <i>One-on-One Meetings (O3s)</i> course.</li> <li>Take the assessment to find out how your personality affects your one-on-one meetings behavior.</li> <li>Hold one-on-one meetings with your direct reports, following a proper agenda.</li> <li>Reflect on your experience.</li> </ul>
<p><b>Psychological Safety</b></p> <p>Psychological safety is a critical aspect of a healthy organizational culture. When employees feel psychologically safe, they are more likely to take risks, speak up about concerns or problems, and share innovative ideas.</p>	<p>By the end of this coaching plan, participants will learn:</p> <ul style="list-style-type: none"> <li>How to create a culture of learning, growth and innovation.</li> <li>How to create and maintain a psychologically safe work environment for your team.</li> <li>Questions to ask your team to foster a culture of psychological safety.</li> </ul>	<ul style="list-style-type: none"> <li>Watch the webinar, <i>The Fearless Organization</i>, with Dr. Amy Edmondson.</li> <li>Take the self-assessment to find out your psychological safety skill level.</li> <li>Practice psychological safety habit builders with your team.</li> <li>Reflect on your experience.</li> </ul>
<p><b>Recognition</b></p> <p>Recognition is a vital component of employee engagement because it helps to create a sense of value and appreciation among employees. When employees feel recognized for their hard work, they are more likely to feel motivated and engaged in their work.</p>	<p>By the end of this coaching plan, participants will learn:</p> <ul style="list-style-type: none"> <li>Strategies to show recognition to team members.</li> <li>More about team members' recognition and appreciation preferences.</li> <li>To develop the habit of looking for opportunities to show and provide recognition.</li> </ul>	<ul style="list-style-type: none"> <li>Watch the video, <i>Recognition for Employee Engagement</i>.</li> <li>Do you know how your team members prefer to be recognized?</li> <li>How do you show your appreciation for others?</li> <li>Reflect on your experience.</li> </ul>
<p><b>Relationship Building</b></p> <p>Networking is a vital component of leadership development, as it enables leaders to build relationships and establish connections with individuals and organizations that can support their goals. Effective networking can help leaders gain access to new ideas, resources, and opportunities, as well as insights into industry trends and best practices.</p>	<p>By the end of this coaching plan, participants will learn:</p> <ul style="list-style-type: none"> <li>How to network more effectively.</li> <li>How to build and strengthen relationships on digital platforms.</li> <li>Tips for networking.</li> </ul>	<ul style="list-style-type: none"> <li>Listen to podcast, <i>Networking Made simple</i>.</li> <li>Leadership self-reflection.</li> <li>Networking activities.</li> </ul>

LEARNING OBJECTIVES

MICROLEARNING

**Remote Teams**

Leading remote teams is an important skill for leaders to have in today's global, connected world. Leaders who can communicate effectively, build trust, leverage technology, be flexible, and culturally sensitive can help their remote teams succeed and thrive.

- By the end of this coaching plan, participants will learn:
- The six best practices for managing remote teams.
  - What the 3 agreements are and why they are important.
  - How to improve meeting efficiency.

- Watch *Managing Remote Teams*.
- Establish 3 agreements (hours, timing, notice) to keep your team connected.
- Revisit and discuss your weekly team meeting.
- Reflect on your experience.

**SMART Goals for Teams**

SMART goals provide a clear and structured framework for setting goals in an organization, which can help ensure that objectives are well-defined, achievable, and aligned with the organization's larger mission and strategy. This can help increase accountability, motivation, and focus among team members, and ultimately lead to more effective and efficient goal attainment.

- By the end of this coaching plan, participants will learn:
- The elements of SMART goals.
  - How to use a SMART Goals worksheet to define objectives.
  - Ways to improve their approach to supporting team members' goals.

- Read the article, *Overview to SMART Goals*.
- Take the assessment to find out how well you support your team members with goal setting.
- Set SMART Goals with each of your team members.
- Reflect on your experience.

**Team Building**

Overall, setting clear goals, defining roles and responsibilities, and establishing norms can help teams work more effectively together. When everyone is aligned around a common purpose, understands their individual contributions, and knows how to interact with one another, teams can achieve their goals and accomplish great things.

- By the end of this coaching plan, participants will learn:
- How and why they should be building superteams.
  - To strengthen their teams by examining goals, roles and norms.
  - To apply developmental activities to further strengthen their teams.

- Read the book summary, *Team of Teams*, by General Stanley McChrystal.
- Take the Team Self-Assessment.
- Hold a team-building activity.
- Reflect on your experience

**Transition to Manager**

Becoming a manager for the first time can be an exciting opportunity to lead and guide a team towards achieving shared goals, but it also comes with new responsibilities and expectations. This course is designed to equip new managers with the tools and strategies needed to navigate common challenges that arise in a management role.

- By the end of this coaching plan, participants will learn:
- How to avoid common first-time manager mistakes.
  - Tips for first-time managers.
  - How to delegate effectively.

- Complete the *First Time Manager Fundamentals* course.
- Take the delegation IQ assessment.
- Practice "Effective Delegation."
- Reflect on your experience.

**Trust**

Building trust is essential for effective leadership. When leaders create a healthy and productive work environment and team members trust their leader, they are more likely to feel engaged, committed, and motivated to do their best work.

- By the end of this coaching plan, participants will learn:
- To build trust with the 4 C's.
  - To strengthen their transparency and authenticity behaviors.
  - How to build trust by using the 5 "waves" of trust.

- Read the book summary, *The Speed of Trust*, by Stephen M.R. Covey.
- Take the 4 C's of Trust Self-Assessment.
- Commit to 3 actions to build trust intentionally this week.
- Reflect on your experience.

# SLII® Concepts

## Great Leaders See the Promise in Everyone



**The blistering pace of change demands a different kind of leadership model.**

SLII® Concepts teach what it means to lead situationally. That means giving people the right support or direction at the right time, having authentic conversations that empower them, and caring about their growth.

Be their champion. See their promise. SLII Concepts introduce the art of diagnosing an individual's or team's development level and then using the appropriate leadership style in response. Fast-paced, content-rich SLII Concepts is an immersive solution that can be used to introduce or reinforce SLII.

**Outcomes**



Accelerate development and autonomy



Use a common leadership language



Enhance performance and achievement



Improve engagement and retention



# Leading an Organization

## LEARNING OBJECTIVES

## MICROLEARNING

### Decision Making

Effective leadership requires both decision-making and critical thinking skills. Leaders who are able to make sound decisions and think critically are better able to navigate complex challenges, anticipate potential obstacles, and lead their teams to success. These skills allow leaders to evaluate options, make informed choices, and adjust course as needed to achieve their goals.

By the end of this coaching plan, participants will learn:

- To identify factors that prevent good decision-making.
- To utilize a decision journal to facilitate making sound judgements.
- To move through a strategic process with confidence.

- Read the book summary, *Thinking, Fast and Slow*, by Daniel Kahneman.
- Take the Decision-Making assessment.
- Read the article, "How to Use a Decision Journal."
- Reflect on your experience.

### Innovation

Innovation and creativity are essential for leadership because they allow leaders to envision new possibilities, identify opportunities, and create value in the face of uncertainty and change. By fostering a culture of innovation, leaders can empower their teams to think creatively, experiment with new ideas, and take calculated risks. This approach can help organizations stay ahead of the competition, adapt to changing market conditions, and drive long-term growth.

By the end of this coaching plan, participants will learn:

- How to use the SCAMPER method of brainstorming.
- To assess their Innovation & Creativity skills.
- How to get their team involved in brainstorming.

- Read the article, *SCAMPER Your Way to Innovation & Creativity*.
- Take Innovation & Creativity self-assessment.
- Plan a show & tell meeting.
- Reflect on your experience.

### Strategic Mindset

Having a strategic mindset is an important skill for a leader because it allows them to think beyond the present and plan for the future. A leader who thinks strategically can effectively navigate complex and uncertain situations, adapt to changing circumstances, and position the organization for long-term success.

By the end of this coaching plan, participants will learn:

- To identify areas for improvement.
- Ways to improve their strategic thinking skills.

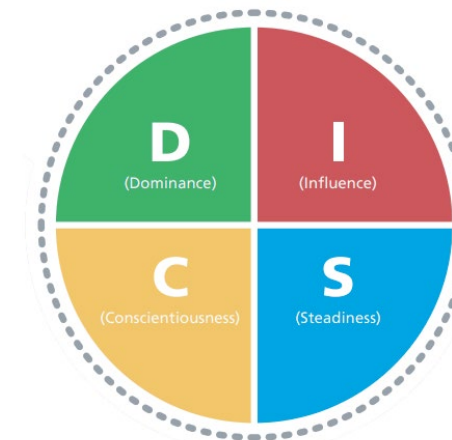
- Watch the *4 Ways to Improve Strategic Thinking* video.
- Take the Strategic Mindset self-assessment.
- Make time to apply strategic vision skills.
- Reflect on your experience.



# Unlock Your Leaders' Self-Awareness with DISC

Assess your leaders' styles, then turn insights into action.

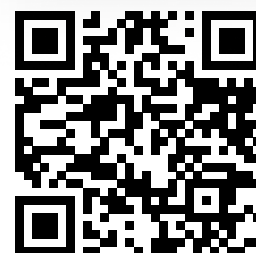
- ✓ Send personalized nudges based on your learners' DISC results
- ✓ Reinforce learning with micro-learning exercises.
- ✓ Deliver elite coaching: One-on-one, group, and live, real-time messaging.



📖 Knowledge → 🛠 Practice → 🔄 Habits

"I thought it was GREAT! I love the ability to watch videos (or listen to videos- I'm a podcast gal) and explore the content. I liked the push reminders and the idea of using the DISC profiling for me and to better understand my team."

*District Manager at Syneos Health*



[Book a demo with LEADx to learn more!](#)

# Self-Awareness

## 16-type Assessment

A 16-type personality assessment is a tool designed to categorize individuals into one of 16 distinct personality types based on how they perceive the world and make decisions.

### LEARNING OBJECTIVES

By the end of this coaching plan, participants will:

- Learn about their personality and how they relate to others.
- Explore the four dichotomies of the 16-type personality assessment.
- Understand when their personality is seen as a strength.

### MICROLEARNING

- Take the assessment to discover your 16-type personality profile.
- Watch the “16-Type Personality” video course.
- Read how your 16-type personality impacts your success.
- Reflect on your experience.

## Big 5 O.C.E.A.N.

The Big Five personality traits, also known as the Five-Factor Model, is a widely accepted model for assessing personality. It consists of five main dimensions: openness to experience, conscientiousness, extraversion, agreeableness, and neuroticism.

By the end of this coaching plan, participants will:

- Explore their personality and how they relate to others.
- How to modulate their extraversion trait.
- Understand how aspects of their personality can be helpful or detrimental.

- Take the assessment to discover your Big 5 personality profile.
- Read pages 8-10 of Big 5 Personality Report.
- Focus on your extraversion trait to maximize team communication.
- Reflect on your experience.

## CliftonStrengths

The CliftonStrengths assessment is a tool designed to identify an individual's unique strengths and talents. The assessment helps individuals discover their natural talents and how they can be applied to various aspects of their lives, such as career development, leadership, and personal growth.

By the end of this coaching plan, participants will:

- Learn an overview of CliftonStrengths.
- Explore how their theme has been a strength.
- Learn how to use their strengths to help with work priorities.

- Watch the CliftonStrengths overview and your top 5 strengths overview videos.
- How has your top strength helped you be successful in the past?
- This week, use your top 5 strengths to help with current work priorities.
- Reflect on your experience.

## DISC

The DISC profile is a behavioral assessment tool that involves a series of questions that help individuals identify their preferred style and how it may influence their interactions with others. The DISC profile can be useful in various settings, such as team building, conflict resolution, and leadership development.

By the end of this coaching plan, participants will:

- Explore their DISC style.
- Understand how and when their DISC style has been a strength.
- Learn how to work better with other team members.

- Take the assessment to discover your DISC behavioral profile.
- When has your dominant DISC style helped you be successful in the past?
- Use DISC to maximize your communication with a team member.
- Reflect on your experience.

## EQ-i 2.0

EQ-i, or emotional intelligence quotient, can be highly valuable for leaders because it allows them to better understand and manage their own emotions, as well as those of their team members. By improving their EQ-i, leaders can enhance their ability to communicate effectively, build strong relationships, and inspire their team.

By the end of this coaching plan, participants will:

- Determine if they are flexible or impulsive.
- Learn how emotions impact decisions.
- Learn how to convey emotions without hurting others.

- Get feedback on strengths and weaknesses.
- Complete worksheets that explore emotions, empathy and self-awareness.
- Explore impulse control.

## Emotional Intelligence

Emotional intelligence is important for leaders because it allows them to understand and manage their own emotions, as well as the emotions of others. EQ also enables leaders to handle conflict and stress in a constructive manner, and to make informed decisions that take into account the impact on their team and stakeholders.

### LEARNING OBJECTIVES

By the end of this coaching plan, participants will:

- Learn to recognize their own emotions and the emotions of people around them.
- Explore their self-awareness, social awareness, self-management, and relationship management.
- Learn ways to develop their emotional intelligence.

### MICROLEARNING

- Complete the *Emotional Intelligence* (EQ) course.
- Take your organization's preferred EQ assessment or use the free EQ quiz.
- Focus on one of the four EQ components this week.
- Reflect on your experience.

## Insights Discovery

Insights Discovery is a personal development tool that can benefit someone by providing insights into their unique personality and preferences, as well as those of others. By understanding their own strengths and weaknesses, as well as how they relate to others, individuals can develop more effective communication and collaboration skills.

By the end of this coaching plan, participants will:

- Learn how to improve their relationship with a peer.
- Learn how to improve their relationship with their manager.
- Learn how to improve their decision-making process.

- Using your Insights style to communicate effectively.
- Reflect on when your Insights style has helped you to be successful.
- Reflect on the impact of your Insights style on others.

## Leadership Challenge: Leadership Practice Inventory

The Leadership Practices Inventory (LPI) is a powerful personal development tool that can benefit leaders in a number of ways. It provides leaders with a clear picture of their strengths and areas for improvement in five key leadership practices: modeling the way, inspiring a shared vision, challenging the process, enabling others to act, and encouraging the heart.

By the end of this coaching plan, participants will:

- Learn how to create a clear, compelling vision.
- Learn what is strategic recognition and why it matters.
- Learn how to challenge the status quo.

- Reflect on a core value; discuss with team members.
- Read the book summary, *The Vision Driven Leader*.
- Watch the video, Recognition for Employee Engagement.

## Leadership Circle Profile

The Leadership Circle Profile™ (LCP) 360 provides a detailed snapshot in time, enabling leaders to answer the question: “How are my behaviors and mindset enabling or constraining my intended leadership impact and our business performance?” By measuring a leader’s Creative Competencies and Reactive Tendencies, the LCP explores underlying beliefs and assumptions—the habits of thought that run much of our behavior. As leaders gain these insights, they have much higher leverage to make transformative change.

By the end of this coaching plan, participants will:

- Learn the key behaviors and internal assumptions that lead to high fulfillment, high achievement leadership.
- Explore the eighteen Leadership Competencies.
- Explore the eleven Reactive Tendencies.

- Review LCP assessment and interpretation manual.
- Activities that focus on behaviors to improve dimensions.

## Social Styles

Social Styles refers to an individual's preferred way of interacting with others, and includes four main styles: analytical, driving, amiable, and expressive. By understanding the social styles of their team members, a leader can tailor their communication style to better resonate with each individual.

By the end of this coaching plan, participants will:

- Explore how their Social Style has been a strength.
- Learn how to recognize the Social Styles of others.
- Learn how to work with different Social Styles.

- When has your dominant Social Style helped you to be successful in the past?
- Decode the Social Style of colleagues or customers.
- Maximize your communication with a team member.
- Reflect on your experience.

# LOOKING TO LAUNCH A WILDLY SUCCESSFUL FIRST-LINE LEADER PROGRAM?

LEADx FIRST-LINE LEADERS > Phase 1

COMPETENCY	Week 1	Week 2	Week 3	Week 4
MONTH 1 ▶ Self-Awareness Big 5 Personality	Assess	Learn	Apply	Reflect Group Coaching
MONTH 2 ▶ Transition to Manager	Learn	Self-Assess	Apply	Reflect Group Coaching
MONTH 3 ▶ Effective Feedback	Learn	Self-Assess	Apply	Reflect Group Coaching
MONTH 4 ▶ One-on-One Meetings	Learn	Self-Assess	Apply	Reflect Group Coaching
MONTH 5 ▶ Critical Conversations	Learn	Self-Assess	Apply	Reflect Group Coaching
MONTH 6 ▶ Coaching with G.R.O.W.	Learn	Self-Assess	Apply	Reflect Group Coaching

LEADx

Choose **monthly topics** for **your managers**.

And turn these topics into HABITS using:

- ▶ Self-Assessments
- ▶ Micro-Learning
- ▶ Nudges
- ▶ On-the-Job Application
- ▶ Group Coaching



LEADx®



# JOIN THE #1 COMMUNITY OF PRACTICE FOR LEADERSHIP DEVELOPMENT PROFESSIONALS

Each month, over 100 directors of leadership development meet on Zoom to share best practices, solutions to challenges, and to build new relationships.

This no-cost Community of Practice includes 700+ leadership development professionals from companies like Accenture, Northwestern Mutual, Google, Johnson & Johnson, BMW, and many others.

**Connect, learn, and  
grow with your peers**



**LEADx**<sup>®</sup>

“ I just finished a weeklong training conference, and I learned more and received more value from one session with the community than I did in that entire weeklong conference.”

—Kim Zimmerman,  
Leadership Development Manager at Inspire Brands

