

CASE STUDY

# LEADx

How LEADx Helped Northwestern Mutual Scale Leadership Development and Engage Emerging Leaders with Micro-coaching and Nudges

**3,000**

**LEADERS & EMERGING LEADERS**

**73%**

**MONTHLY AVERAGE USERS**

**32%**

**COACHING PLAN COMPLETION RATE**



“Leadership development is a top priority, especially for our field leaders. LEADx is helping us to bring micro-learning and micro-coaching to the field in a way that fits into a busy leader’s development plan.”

**Vicki Holt**

Assistant Director of Leadership Development at Northwestern Mutual



## HIGHLIGHTS

### CHALLENGES

- Scaling leadership development
- Developing emerging leaders, especially women and people of color
- Make appealing to busy always on-the-go professionals

### SOLUTION

- Quarterly Micro-Coaching Plans Aligned to Competencies
- Hyper-personalized Nudge Engine
- Micro-Learning Content

### RESULTS

- 73% regular usage
- 4 out of 5 star content rating
- Diverse talent pipeline



# The Challenge

## Scaling leadership development across ~4000 managers

Northwestern Mutual is a Fortune 500 financial services company that provides holistic financial planning to 4.75 million clients nationwide.

In 2018, managing partners asked for training and development that could support more of their agency leaders (e.g., college unit directors, growth and development directors, field directors) while preparing and inspiring other high-potential team members—particularly women and people of color—to pursue leadership roles.

The platform needed to:

- Be scalable, so that thousands of participants nationwide could work through the same content at the same time
- Be mobile-first, so participants could access content on-the-go and in-between client meetings
- Utilize high-quality, micro-learning content

Given these requirements, traditional classroom lectures and live workshops were out of the question. Northwestern Mutual needed a solution that could be accessed easily, on-demand through smartphones, in bite-sized chunks.



“Leadership is needed in everything we do – using the content from this program helps each of us grow personally in our family life and the community, and professionally in our careers.”

-Steve Gross, Managing Partner



# The Solution

**Behavior change platform that includes micro-coaching, behavioral nudges, micro-learning**

Northwestern Mutual initially engaged LEADx and three other micro-learning vendors for a comprehensive proof-of-concept program. Each vendor was evaluated on a variety of metrics that included: quality of content, ease of use, and accessibility on smartphones.

LEADx emerged as the winner because of its mobile-first, intuitive user experience and variety of high-quality content.

The LEADx platform also includes:

- Behavioral nudge engine
- Coach Amanda, which combines behavioral science, artificial intelligence, and expert content
- Quarterly action plans mapped to leadership competencies, like Diversity and Inclusion
- Over a thousand micro-learning assets including videos and book summaries
- Support for a variety of personality assessments including Social Styles and DISC



Coaching Topics include:

- Relationship Building
- Social Styles
- Growth Mindset
- Motivating Others
- Diversity & Inclusion
- Building Trust
- Innovation & Creativity
- More



# Results

## Strong usage, high completion rates, and improved diversity of talent pipeline

Northwestern Mutual rolled out the LEADx-powered Leadership Ascent program in waves. In Q1 2021, 1,400 people went live within the LEADx platform. Going into Q2, that number increased to 2,000 across 66 field offices. And has since increased to even greater numbers.

Quantitative results include

- 32% of all participants completed all 12 weeks of the Q1 D&I coaching plan—compared to 10% usage most online content libraries and learning management systems see each month
- 73% of the program participants are using the LEADx app on a monthly basis
- 97% of users receive behavioral nudges
- Participants consistently rank the quality and value of LEADx content as four out of five stars

Additionally, Holt has received positive qualitative feedback from her leaders in the field.

Steve G., a managing partner, says the program is helping to create the culture and environment he wants in his network office.

Above all else, one of Northwestern Mutual's critical outcomes for the Leadership Ascent program was to get more people interested in leadership roles, especially women and diverse talent.



*“Leaders are telling us that, yes, you are helping me build my talent pipeline for leadership roles, and that’s a huge win,” said Holt.*

Paul D., managing partner in NY, echoes this. “The program is allowing us to cast a wider net for leadership development, more than we’ve ever done in the past.”

**Would you like to turn millennial managers into legacy leaders?**



**Would you like to scale and sustain leadership with AI-powered nudges, coaching, and micro-learning?**

Interested in how LEADx supports your existing competencies, behavioral profiles (DiSC, EQ-i, CliftonStrengths, etc.), and engagement scores?

Contact us for a free and friendly demo:

**INFO@LEADX.ORG**