

CASE STUDY

LEADx

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

92%

INCREASED LEADERSHIP
CONFIDENCE

92%

INCREASE IN APPLICATION OF
LEARNING ON THE JOB

82%

COMPLETION OF ALL
COACHING EXERCISES



"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."

Emerging Leader



HIGHLIGHTS

CHALLENGES

- Design and deliver a program for emerging leaders that develops key behaviors.
- Design and deliver a program for first-line leaders that develops key behaviors.
- Reach busy learners in the flow of work.

SOLUTION

- An application-focused curriculum with monthly topics customized to each program.
- Weekly micro-coaching activities and nudges.
- Monthly group coaching + LiveCoach.

RESULTS

- 92% increased leadership confidence
- 92% increase in application of learning on the job
- 87% usage of the platform



The Challenge

Scaling high-quality development for emerging and first-line leaders

First-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.



The Solution

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.

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

Leaders Emerging at Ascensus Program (LEAP) for Emerging Leaders: Months 1-6					
	COMPETENCY	Week 1	Week 2	Week 3	Week 4
MONTH 1 ▶	Self-Awareness LEADx DISC	Assess	Learn	Apply	Reflect Group Coaching
MONTH 2 ▶	Growth Mindset	Learn	Self-Assess	Apply	Reflect Group Coaching
MONTH 3 ▶	Building Confidence	Learn	Self-Assess	Apply	Reflect Group Coaching
MONTH 4 ▶	Active Listening	Learn	Self-Assess	Apply	Reflect Group Coaching
MONTH 5 ▶	Drives Results	Learn	Self-Assess	Apply	Reflect Group Coaching
MONTH 6 ▶	Agility & Adaptability	Learn	Self-Assess	Apply	Reflect Group Coaching

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



The Solution (cont'd)

Ascensus put together a distinct set of topics to suit each audience

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

Foundations of Leadership (FOL) Program for First-Line Leaders: Months 1-6					
	COMPETENCY	Week 1	Week 2	Week 3	Week 4
MONTH 1 ▶	Self-Awareness LEADx DISC	Assess	Learn	Apply	Reflect Group Coaching
MONTH 2 ▶	Transition to Manager	Learn	Self-Assess	Apply	Reflect Group Coaching
MONTH 3 ▶	Leading Change	Learn	Self-Assess	Apply	Reflect Group Coaching
MONTH 4 ▶	Effective Feedback	Learn	Self-Assess	Apply	Reflect Group Coaching
MONTH 5 ▶	Coaching Essentials GROW	Learn	Self-Assess	Apply	Reflect Group Coaching
MONTH 6 ▶	Strategic Vision	Learn	Self-Assess	Apply	Reflect Group Coaching

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

A key element of both of these leadership series is the cadence of one topic per month.



“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.”

–Tricia Reese, VP of Leadership, Learning, and Organizational Development





The Solution (cont'd)

The key to scaling? A blended approach of live workshops, mikro-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:** “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.”
- **Group coaching in a ‘flipped classroom’ model:** The cadence (pictured on the previous page) 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.

- **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.



“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.”

–Megan Cashdollar, Sr. Leadership and Organizational Development Specialist



Results

Leveraging our behavior change platform and cadence activated huge improvements across target leadership behaviors.

After completing both the LEAP and FOL programs, a comprehensive analysis was conducted including pre- and post-assessments and activity metrics.

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

And 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

Build and Sustain Behavior Change with the LEADx Development System

Looking to build, refine, or revamp a leadership series? We team up with companies like Northwestern Mutual, Syneos Health, and Duck Creek Technologies to roll out highly-engaging leadership development series for Emerging Leaders, New Managers, Women in Leadership, High-Potential Managers, and more!

What makes our series so uniquely engaging? We help you build a full system of development that leverages our cutting-edge platform and world-class training. We blend together:

- world-class, cohort-based virtual training and group coaching
- personalized nudges
- micro-learning
- on-demand "office hour" style coaching



[Book a strategy call here.](#)