Innovation

in senior-level assessment and development

A deep dive into the creation and success of the innovative cloud-based leadership development program ***MyLead and*** *how it addresses the critical issue of developing a common set of leadership standards across a highly diverse, decentralized, global organization, in a manner that blends high-impact delivery with psychological principles of learning and professional development.*

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Grab 'em when and where you can

In designing the assessment and development program, we were committed to capturing the interest and motivation of an elite group of senior leaders who tend to be fast-paced, client-driven individuals

This white paper describes an innovative, experiential leadership development program developed in partnership between The Interpublic Group of Companies, Inc., one of the world's leading marketing communication services companies, and its external consultant, a talent management consulting firm. The goal of the program, branded internally as *MyLead* by IPG, is to provide in-depth, impactful assessment and development to individuals in mid-level to senior leadership roles whose responsibilities include staff leadership, significant client relationships, and business development accountabilities. The target population is dispersed across the globe. Although each office is locally led with a great deal of autonomy, the broader IPG organization has a strong demand for a leadership pipeline.

Three years prior to the launch of *MyLead*, IPG had instituted a global succession management process. This process helped to define and shape their global leadership development needs. At that time, the only consistent leadership development program across the enterprise was a leadership program for senior executives—a board-level event. All other leadership development programs were developed and run by local business units with highly variable degrees of quality and regularity. The success of the senior executive development program demonstrated the possibility of success for a consistent leadership development program across business units.

Additionally, the succession management process indicated a need for a more consistently available and high-quality approach to development for mid-level and senior leaders.

The assessment and development program addressed the critical issue of developing a common set of leadership standards across a highly diverse, decentralized, global organization, in a manner that blends high-impact delivery with psychological principles of learning and professional development. In designing the assessment and development program, we were committed to capturing the interest and motivation of an elite group of senior leaders who tend to be fast-paced, client-driven individuals, and, as part of a leading marketing communications enterprise, are familiar with the most up-to-date audience impact and visual production technologies. As a group, they tend to place a high value on creativity and innovation and, frankly, a low value on structured

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programs. Our objective was to develop something that was leading-edge, would create excitement and engagement, and would deliver a high return on investment.

The Challenges

There were several key complicating factors to consider in developing the correct solution. First, there was the need to promote the leadership development of top talent across multiple business divisions, work disciplines, and cultures. At the senior level, the roles within the organization range from functional or technical experts to client relationship or account executives, strategic planners, and creative directors. It was essential to create a program that spoke to the needs of IPG leaders regardless of their role in the organization, agency, or particular office; which did not demonstrate a bias toward one area of expertise, was not unique to any agency or local office structure, and was not culturally or geographically bound.

As with any company, cost was a concern. Per-participant costs needed to be kept very low so as not to be a barrier to entry for any local office. However, costs also needed to provide for the delivery of a high-touch, high-value development solution across thirty-three countries and hundreds of locations. There was the need for what we began calling a "low drag" experience. This referred to two different notions. First, we needed to provide an in-depth development experience without sacrificing the participants' available billable hours. Participants could not leave work to attend a program and risk losing potential client revenue, as this would make the cost of any program untenable.

Additionally, we needed to accommodate individual work schedules while providing a common experience. With a global, client-driven population of participants, we needed to be very flexible and not dictate set times for participation. Therefore, we wanted to create as close to an "always-on" system as possible that would allow for true flexibility in participation.

Finally, we wanted to provide an individualized experience based on each participant's unique learning styles and development needs, while also ensuring that that there was a high degree of consistency in each participant's experience. We needed to create learning elements that were flexible enough to accommodate different skill levels and diverse development needs, but

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that would be perceived as appropriate for the experience and seniority levels of the target audience. Thus it was critical that we integrate multiple business challenges, present them through a range of media, and provide them with one-on-one support and coaching throughout the program. In this way we hoped to cast a wide net with which to draw people to the experiences and insights necessary for true learning to occur.

The challenge was to address all these needs and design an approach to learning and development that would resonate with this audience. The program needed to be immediately compelling, but also offer great value for the time it would demand away from billable work. It needed to speak to the needs of a global senior audience, have low drag, and be flexible regarding time commitments and learning elements that a participant might choose to use. The solution needed to drive company-wide leadership competencies, have individualized learning elements for each participant, and involve a large degree of personal contact, feedback, and coaching. It needed to offer a consistent experience and, of course, it needed to be low cost.

Identifying the Solution

The assessment and development program was developed with a corporate advisory board from around the world representing all IPG business divisions and agencies convened specifically for the purpose of guiding program development and a cross-agency team of IPG development professionals. By engaging both internal groups from the beginning, we were able to obtain support for the program and gather their subject-matter expertise in helping to prioritize the competencies we identified, as well as their insights into the unique learning needs and optimum delivery modalities of the target audience of participants. The assessment and development program was positioned as something they had a significant hand in creating, not something that was being done either for them or to their constituents. It was also described as a response to senior leader requests for a greater talent pipeline and as a leadership initiative requiring their talents in driving through the agencies.

The first step in the design process was to identify the competencies critical for success in cross-agency, cross-geography, cross-functional senior leadership roles. A competency modeling process was undertaken that involved a representative sample of all functional areas, major agencies, and important

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global locations of the organization. A set of leadership competencies emerged centered on people leadership, business leadership and profitability, and client leadership. The corporate advisory board reviewed and refined the competency model that was developed.

While developing the leadership competency model, we researched new approaches to senior-level learning, investigated current practices within IPG, and spent time in different agencies to better understand the challenges, motivations, environmental demands, tolerance levels for developmental interventions, and a myriad of other factors. We also spent time considering several different intervention approaches to address IPG's needs.

The first, and most expedient, approach was some type of e-learning solution in which participants could engage, or not, of their own accord. However, the concern with this approach was that it would not necessarily provide the correct content and necessary level of customization for this audience and that e-learning would not be a very engaging or appropriate intervention for leaders at this level.

We also knew that, at the other extreme, a university-based program was not going to be acceptable based on the high cost of these programs, as well as the need to send people to a specific location for a significant period of time. Another possibility was a traditional executive coaching program.

Coaching programs, however, can be very expensive and also have an inherent variability in quality that makes them difficult to manage. Coaching would also not support the desire to "teach" in any systematic way or single voice the newly identified leadership competencies core to success at IPG. Another consideration was a traditional development-focused assessment center. However, these also generally require individuals to leave their jobs for periods of time and assemble in a particular location. They are generally one-time events and often perceived to be divorced from real-world activities.

While effective, they rely on the assessor/coach being able to observe the individual in-situ, which on a large global scale can become very expensive and administratively difficult to manage. There was also heightened sensitivity to the notion of senior leaders "being assessed." Instead, the corporate advisory board wanted to promote the program as an opportunity for leaders to further their

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learning, to be challenged, and to be coached in skills they could immediately apply back to the workplace. They wanted neither an evaluative atmosphere around the program, nor any repercussion as an outcome of poor or even superior performance.

This all led us to conclude that we needed to look for a new approach to leadership development that leveraged best practice from multiple approaches and broke set with previous models.

The Solution

The assessment and development program developed for IPG sought to solve these challenges by delivering the joint benefits of a developmental assessment center and executive coaching delivered over time and distance using Internet-enabled technology. The program brings together four critical elements to create a highly impactful leadership assessment and development experience: the rigor of assessment center methodology, the power of executive coaching, the impact of learner-directed content, and the global reach and flexibility of web-based technology.

This approach allowed us to provide participants with opportunities to experiment with new leadership behaviors in a virtual assessment center setting deliberately turned into a learning environment with both one-on-one support, in the form of role players and coaches, and e-learning elements.

The assessment and development program became the focal point for introducing the leadership competencies into the organization, determining participant learning needs, and building the requisite leadership skills. The program contributes directly to organizational strategy by focusing participants on challenges associated with growing the business, improving profitability, leading people, and managing clients.

The assessment and development program built in a large amount of participant choice regarding what to do and when to do it. We believed this would be appropriate for leaders at this level and increase engagement as well as leverage the advantages of distributive learning, which maximizes transfer back to real-world settings.

The coach acts as a guide throughout the program, offering feedback and coaching about the participant's areas for development and how to tie learning back to the job.

Table 11.1 describes the components and flow of the development center.

The Assessment and Development Program Structure

Week 1	**Orientation and Preparation**	Receive program information and complete introductory materials Complete planning discussion with executive coach
Week 2	**Simulation Module 1**	Participate in the simulation for four hours during the week Address issues Receive real-time feedback on phone interactions Receive ongoing access to development resources
Week 3	**Feedback and Coaching**	Meet with coach Access development resources and apply learning back to the job
Week 4	**Simulation Module 2**	Participate in the simulation Receive ongoing access to development resources and message board
Week 5	**Feedback and Coaching**	Meet with coach Access development resources and apply learning back to the job
Week 6	**Simulation Module 3**	Participate in the simulation Receive ongoing access to development resources, and apply learning back to the job
Week 7	**Feedback, coaching and development planning**	Meet with coach Create a post-program development plan Meet with manager to review development plan

Table 11.1

Over a period of seven weeks, the assessment and development program participants alternate between assessment/simulation and coaching weeks for three rounds of learning. Each participant is assigned an executive coach. The coach acts as a guide throughout the program, offering feedback and coaching about the participant's areas for development and how to tie learning back to the job. The coach also helps the participant identify development opportunities with the simulation that serve to focus the participant's experience on challenges that will most readily develop the participant in the areas identified.

The program kicks off with a set of introductory materials that describe the program, time commitments required, goals, and coaching and confidentiality agreements (which are to only reveal whether someone completed the program). Participants are required to complete the Honey and Mumford (2006) Learning Styles Questionnaire (LSQ) and a career accomplishment profile via web-administration and engage in an initial coaching interview with their

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assigned coaches via telephone. This initial set of exploratory materials and coach conversation offer an opportunity for the participant and coach together to begin a process of customizing the experience for the participant. They identify and discuss the learning elements of the program through the lens of the learning styles and self- report assessment of leadership competencies. The coach suggests those elements of the development program that have the most utility for each participant's preferred learning style, recommends leadership competencies to focus on, and engages the participant in a discussion of specific challenges in his or her current role or possible desired stretch roles.

During assessment/simulation weeks, a participant plays the role of a leader in a fictional, global organization. As opposed to our typical day-in- the-life experience, the simulation represents a quarter-in-the-year experience.

Each of the three simulation weeks represent a successive quarter for the fictional organization with evolving challenges. Participants address challenges through telephone interactions with role players in a phone bank (portraying any and all of the subordinate team members, clients, or colleagues), and in-basket exercises with email, voicemail exchanges, business and budget reports, and other information all delivered through the technology platform. Each of them has one extensive role play with his or her coach during each assessment/simulation week, which addresses client, team, or business leadership.

Participants choose what to engage in based on the competencies they have targeted for development. By presenting a parallel world in a fictional organization and in a different industry, agency or role biases are removed and the playing/learning field is leveled across all participants. However, we created a world that closely reflected the participants' to ensure fidelity and gain credibility as a real-world experience.

Participants engage in challenges such as building a client presentation to generate business, recruiting a high-potential candidate in the industry, negotiating contracts with clients, resolving turf issues regarding scarce resources, and coaching a derailing manager.

Each activity engaged in by the participant during the assessment/simulation week (for example, email exchanges and role plays) generates feedback. The coach, in turn, integrates all of the feedback data generated from the participant's

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role-play interactions and in-basket exercise, and identifies thematic strengths and development needs. During coaching weeks, the participants have calls with their coaches, during which the coach provides feedback to the participant and discusses learnings, opportunities for development, content to focus on in the next simulation week if possible, and ways to transfer insights back to the workplace.

The entire program is delivered via an online platform that allows for learner-directed access to content such as additional e-learning modules, development planning tools, and self-assessment and journaling tools to help learners process their experiences throughout the development program. The assessment platform mirrors the interactivity of a real computer desktop.

Program Innovations

The assessment and development program presents three innovative advances in assessment and development. First, relying on Honey and Mumford's concepts of learning styles (Honey & Mumford, 2006), we developed a set of tools and activities that we believed were adaptable to each of the four learning styles identified by the researchers. This construct defines four learning styles: Activists, Pragmatists, Reflectors, and Theorists.

We believed that the learning style of the participants would impact both their ability to learn from an online leadership development simulation as well as their choices on how to learn and designed the learning experience accordingly. For example, the program was designed to have reflection worksheets at the end of each simulation week to allow the Reflectors ample opportunity to collect the data acquired during the simulation experience and think about their perspectives. For Theorists, we began the program with an introduction to the leadership model that was the basis for the program.

Then, throughout each element of the program, the feedback referred to the part of the leadership model the simulation was addressing. Additionally, each participant's learning style influenced how the executive coach interacted with the participant. For example, a coach working with a Theorist might suggest certain books for the Theorist to investigate new concepts, while, when working with an Activist, the coach might suggest an on-the-job developmental activity. While all elements were available to everyone, developmental suggestions were

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tailored to each participant's learning style to optimize learning. In this way, the assessment and development program provides a learner with a variety of modalities to acquire skills. These modalities can be readily mixed by a coach to guide the participant to the next round of learning.

A second innovation in our design was to provide a development center experience via web-based technology and combine it with "high touch" components, that is, role players and coaches who would be accessible on the phone and via Internet. This would enable geographically dispersed participants to be engaged in an extensive individualized development experience (thirty hours over seven weeks) with a high degree of scheduling flexibility, but with minimal program cost. Access to the simulation materials remained available on a continuous basis throughout the entire simulation week. Participants could log in and do "work" whenever convenient based on their schedules and from wherever they wanted. Time zones became relatively irrelevant.

The technology-enabled development center platform offered many benefits for IPG's global organization. It provided in-basket exercises, emails, and business cases with embedded information personally addressed to each participant with accurate times and dates, regardless of time zones. This is a great aid to realism and engagement; it is another element contributing to a high-fidelity simulation experience. It also deployed program invitations, feedback reports, post center surveys, and such. It linked, via embedded URLs, to other testing sites or e-learning platforms. It provided for the back-and-forth exchange of emails and other information between a participant and his or her coach. Additionally, it allowed participants to work with whatever tools they normally used during the course of a day, for example, Internet searches, software programs such as PowerPoint or Excel, and so on.

The technology behind the web delivery of the simulation and assessment materials requires little beyond a high-speed Internet connection, a computer equipped with an Internet browser (Safari, Firefox, etc.), and a traditional land line, mobile, or VoIP phone connection. At this point in our global world, these requirements can be considered mundane and easily obtainable in almost all work, travel, and home settings. The technology behind the web-based simulation works as SaaS (software as a service) and does not require participants to install software onto their computers or require a vast amount of bandwidth for the technology to run smoothly.

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The third innovation was a unique intelligence system developed to allow a "phone bank" of English-speaking role players to assume different character roles within the simulation. Role players were junior-level assessors who participated in a four-hour behavioral observation training program, carefully reviewed each simulation and supporting materials, and who were given extensive character notes for each module. They were most often graduate students in industrial/organizational psychology and at times included professional staff from IPG, which helped to keep costs down and added additional organizational perspectives.

Since participants had the ability to telephone any character they wanted to during preset hours, we needed a way for role players to keep records of previous participant calls in order to maintain continuity of participant interactions over time and across a number of different assessors/role players. This was important to deepen the realism of the simulation and enable the coach to evaluate behavior over time and integrate the perspectives of multiple assessors. The intelligence system had several components. After each role-play interaction, the assessor/role player completed a competency driven, behaviorally based feedback form that was reviewed by a program manager within one hour for quality-control purposes and then made immediately available to the participant.

Role players completed a tracking form organized by participant, in which they recorded the outcome of the call and any agreed-on actions. This would help the role players to maintain consistency in the characters and story lines across interactions for each participant, continue to "grow the story," and challenge a participant with higher levels or different types of skills, depending on the participant's individual needs.

For example, a participant, playing the role of a manager in the simulation will reach out to his or her direct report/role player based on some third-party speculation that the direct report has received a job offer from a competitor. This may result in a series of conversations in which the direct report/role player is noncommittal about his or her intentions and may try to negotiate certain perks and/or increased responsibilities. The conversation will increase or decrease in certain areas of difficulty, depending on the participant's needs (for example, political savvy, negotiation skills, ability to provide performance feedback, etc.).

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Results

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Sixty percent of the international participants have been from Europe, 10 percent from Asia, and 20 percent from Latin America and Canada. The assessment and development program has become a core part of the development curriculum in each of IPG's major business divisions and was prominently featured in the development plans of mid- and senior-level executives in the 2009 succession management process.

Program administration is facilitated by the online platform. Participants can engage in the program twenty-four hours a day, seven days a week, from any computer with web access. If participants choose, they can spend a few hours on their office PCs and resume work from their homes. All pre-arranged contacts with their coaches can be scheduled at the participants' convenience.

Using the administrative features of the technology platform, participant engagement is monitored by measuring the use of different learning modalities. As of this writing, participants have, on average, three to five role-player interactions, one coach interaction, and fifteen to twenty email interactions during each of the three simulation modules. Each participant who has completed the program has engaged in at least three of the four planned one-hour coaching sessions and many have requested ongoing coaching engagements. All participants have accessed at least one of the self-directed development tools, while the majority has accessed three or more. Program completion rates are approaching 75 percent.

To determine the measurable results and quality of the assessment and development program, we collected pre- and post-program data from participants. Before the program, we asked participants to rate their skill level on the twelve targeted competencies and to identify the three strengths they would like to build upon or opportunities they want to pursue.

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100 % of participants agree that the program is flexible, easy to use, and find value in their feedback/coaching calls with their coaches.

Immediately after the program, participants were also asked to respond to a series of questions about their experiences, satisfaction, and competency improvement.

Data from the post-program reaction survey shows that the program was well received by the participants:

- 100 % of participants agree that the program is flexible, easy to use, and find value in their feedback/coaching calls with their coaches.
- 93 % of participants agree that the assessment and development program will help them in their current roles.
- 93 % of the participants would recommend the program to others.

Of the areas each participant targeted for development during the program:

- 100 % of the participants report improving in at least one of the leadership behavioral areas (people, client, and business leadership).
- 89 % report improving in at least two of those areas.
- 73 % report improving in all three targeted areas.

Based on the successful results, positive feedback, and increasing enrollment, IPG has expanded the program as of this writing. We are exploring additional program evaluation measures, including retention rates, development plans completed, and robustness of the succession pipeline. A similar program for lower-level managers was developed and has been rolled out to a significantly larger population.

Lessons Learned: The Good, the Bad, and the Ugly

Based on the post program survey data and anecdotal feedback, we knew that through a strong partnership with the client we had created a program with significant success. At the end of the program, participants complete long-term development plans and are encouraged to share the plans with their managers. Managers are given support and tools with which to meet their staff at least halfway and have constructive developmental conversations. There was a buzz about development. The learning and development community across the company was telling us about developmental conversations they were having, managers were engaging in more career conversations, and there were several requests for additional coaching from participants. Participants talked about

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the realism of the simulation, the ability to have spontaneous conversations with characters within the simulation, and the technology-enabled feedback and other support tools that existed that made it both interesting and educational. They talked about the ease of access to the materials and the impact the ongoing coaching had on them.

There were aspects, however, that did not go quite as well as we had expected. One of the guiding principles for the program was to allow as much flexibility as possible to increase the usability of the experience and create a "low drag" intervention. The dropout rate for the program was higher than expected and approached 25 percent. By extending the program over seven weeks, we may actually have compounded a difficult situation. The people we were trying to serve were very busy, client-driven executives. A seven-week time frame, even though it presented a lot of flexibility in the course of each week, likely cut across many different cycles of a work project's lifespan, including both busy and slow periods. Because of this, even those with the most motivation and best intentions to begin and finish the development center may have met with circumstances and time commitments beyond their control. Those who dropped out generally left due to work demands, and some rescheduled for a more opportune time.

For the U.S. staff, the most challenging helpdesk support hours were for our Asia Pacific sessions. We decided to run what we began to call our "all Asia, all the time" groups. Basically, it was easier to run a program focused almost exclusively on the time zone needs of an Asian cohort than to blend this cohort across the needs of the rest of the globe. Similarly, the company had specified that English was the language of business for their senior staff and many clients. However, our primary English-speaking helpdesk had to provide assistance to individuals who were not necessarily comfortable with English instruction. Additionally, all simulation and e- learning materials were delivered in English. However, there were requests for feedback and coaching in a range of languages. These requests were accommodated when possible.

We also learned a number of technology-related lessons. One was to always consider the client technology environment itself, specifically, to consider cross-platform and cross-browser issues. IPG had a significant percentage of users on various Mac platforms. To accommodate this, we needed to expand the list of not only the operating systems on which the application would seamlessly run, but also address browser issues specific to each operating system.

We also learned a number of technology-related lessons. One was to always consider the client technology environment itself, specifically, to consider cross-platform and cross-browser issues.

A final technology lesson learned was the need for more user-experience testing of the technology related to work flow to ensure that what we thought was simple and intuitive was in fact regarded by other, unfamiliar users as such. While we designed the platform to be as intuitive as possible and tested its functionality with user groups before launch, we found some trepidation among the assessment and development program users about the technology itself, as most had never participated in any kind of online simulation. At the beginning of the program, users received an email that directed them to the platform, where, we and our testers believed, the process was mostly self-evident.

However, there was more confusion than we expected. These concerns led to the need to modify the program itself: rather than simply sending an email with instructions, each participant's coach, in an initial meeting, would familiarize the participant with the platform by doing a thorough walk-through of the technology. This, in turn, led to much faster acceptance of the technology as the vehicle for the assessment and development program and, hopefully, to use of all the components.

Overall, the experience allowed us to greatly expand the reach of the technology from an assessment-only environment to one that could deliver learning and development programs as well.

New Directions

As technology advances, so do the opportunities. The growing sophistication of technology will bring more opportunities for increased "touch" or remote assessor and coach contact in all parts of the world. Webcams and other telephony services will all but eliminate the need for travel in assessment and development centers, unless there is an explicit reason or desire to travel. Employee portals allowing for self-registration and scheduling technology can match participants, assessors, and coaches.

Advance interfaces, including abilities for interactive learning opportunities, avatars, and more responsive simulations, will allow for sophisticated branched learning and increasingly difficult scenarios, more engaging simulations, and richer feedback experiences. An increased use of on-demand learning that

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integrates a new approach to blended learning will become a more frequent solution to difficult development problems.

Finally, it is extremely important to remember that just because something can be done does not necessarily mean that it should be. In making the switch from a traditional developmental assessment center paradigm to a technology-enhanced one, the project team should also consider the overall goals, client populations, receptivity to technology, access to high-speed bandwidth, a strong technology support infrastructure, and a host of other factors before implementing a program of this type.

Reference

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About BTS

Business strategy, no matter how well researched and articulated, is only as good as its execution. For 25 years, BTS has been partnering with clients to accelerate strategic alignment and building execution capability to deliver business results. The global leader in strategy implementation, BTS develops and delivers high-impact experiential learning initiatives that drive alignment, mindset and capability around strategic priorities.

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