



BREAKTHROUGH LEARNING – ACCELERATING DEVELOPMENT AND RETENTION OF POTENTIAL SUCCESSORS THROUGH INTEGRATED ACTION LEARNING

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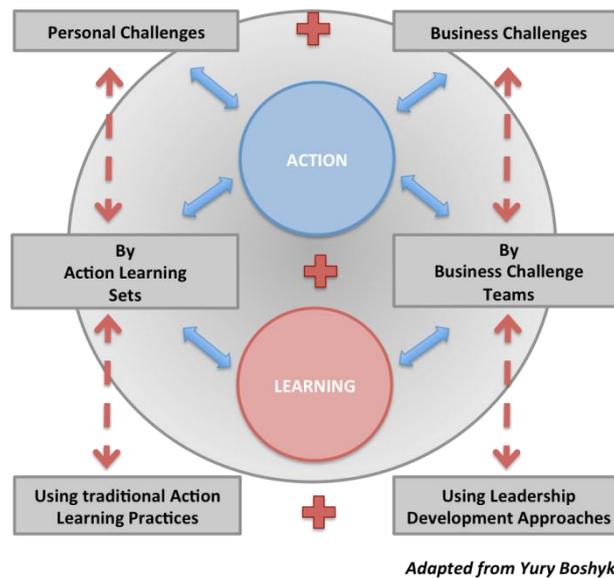
Introduction

With the increasing economic uncertainty, growing complexity and need to respond proactively and rapidly to changing conditions, never before has the competition for exceptional talent been so fierce. The financial services industry is faced with fierce global competition, market consolidation, expansion into new markets, technology and innovation challenges and the need for significant productivity improvement & cost optimization to attract and retain very “sticky” customers. To operate and be better than your competitors in this environment, requires strategic and collaborative leadership, an ability to respond rapidly and lead others through change and continual development of leading edge technical skills applied to develop innovative, integrated, team-based solutions. In the operations and technology space, there is a legacy of promoting good technical people into leadership positions, resulting in less than effective leadership styles, experience and understanding of the true role required to lead the company and its people into the future evolving world.

Within this context we were asked to assist a key client with the accelerated development of potential technology and operations successors (future leaders and technical specialists) that would play this important role. A key challenge was ensuring that the chosen participants would continue delivering results in their current roles, whilst simultaneously learning and working on innovative strategic projects with their learning teams. So we partnered with the company’s talent and learning team to customise a pilot “Breakthrough Learning” program with a view to full implementation as an annual program.

What is Breakthrough Learning?

Breakthrough Learning is our tried and tested, customised approach to Business Driven Action Learning, as described in Yury Boshyk’s book of the same name; which is a management and leadership development intervention based on the two key elements of ACTION and LEARNING. Business Driven Action Learning as visually depicted below includes personal and organisational learning through focused team-based projects aimed at generating solutions to real business challenges / opportunities.



The key features of Breakthrough Learning, which is typically facilitated over 9-12 months, is a blend of the following features:

- *Individualised personal growth options* – this consists of external coaching, internal mentoring, assessment centres, learning sessions on leadership and technical competencies, self-study, interactions with thought leaders and organisational role models and feedback from managers and peers. Competency areas are carefully selected to ensure participants get feedback on critical leadership and technical skills required for future successor roles.
- *Team development and collaboration opportunities* – this entails the development of high performance teams and associated processes of team interaction, feedback and learning. The ideal team has four to eight diverse cross-functional and cross-cultural members, who can bring a variety of perspectives and viewpoints to the tasks and learning at hand. There are regular team coaching and feedback sessions to build feedback fitness and to develop and address areas of team effectiveness proactively. The different teams also interact monthly to share knowledge and learn from each other and explore additional opportunities for co-ordination or collaboration with key stakeholders or technical expertise.
- *Breakthrough Learning projects* – these are executive-sponsored strategic business projects (opportunity and/or problem based) specifically selected for the programme, exposing the individuals and teams to new learning, thinking, skills and behaviours. The projects test the formulation of ideas and solutions, realistic scoping, organisation wide stakeholder engagement, and presentation of project proposals and progress to the sponsors and executive managers.
- *Outside-in approach* – a key element in the learning process is to encourage outside-in thinking and exposure, in order to bring ‘outside the box’ solutions to strategic challenges. This can take the form of select benchmark visits or virtual connections to industries and organisations that do things differently, exposure to thought leaders, best practice research and testing ideas with a variety of people from all walks of life.

Key design elements for Breakthrough Learning

To ensure a successful program it is important to work alongside key organisational stakeholders to understand the business intimately and customise the design to optimise learning and results. There is a need to interrogate the business strategy, the culture, current challenges, competencies required, past and current learning programs and current and future roles required. It is also important to identify and customise the most effective processes for selection of participants, coaches, mentors, teams, project sponsors and strategic projects. All of these factors can make or break an intensive, demanding, extended program that has to happen alongside business as usual.

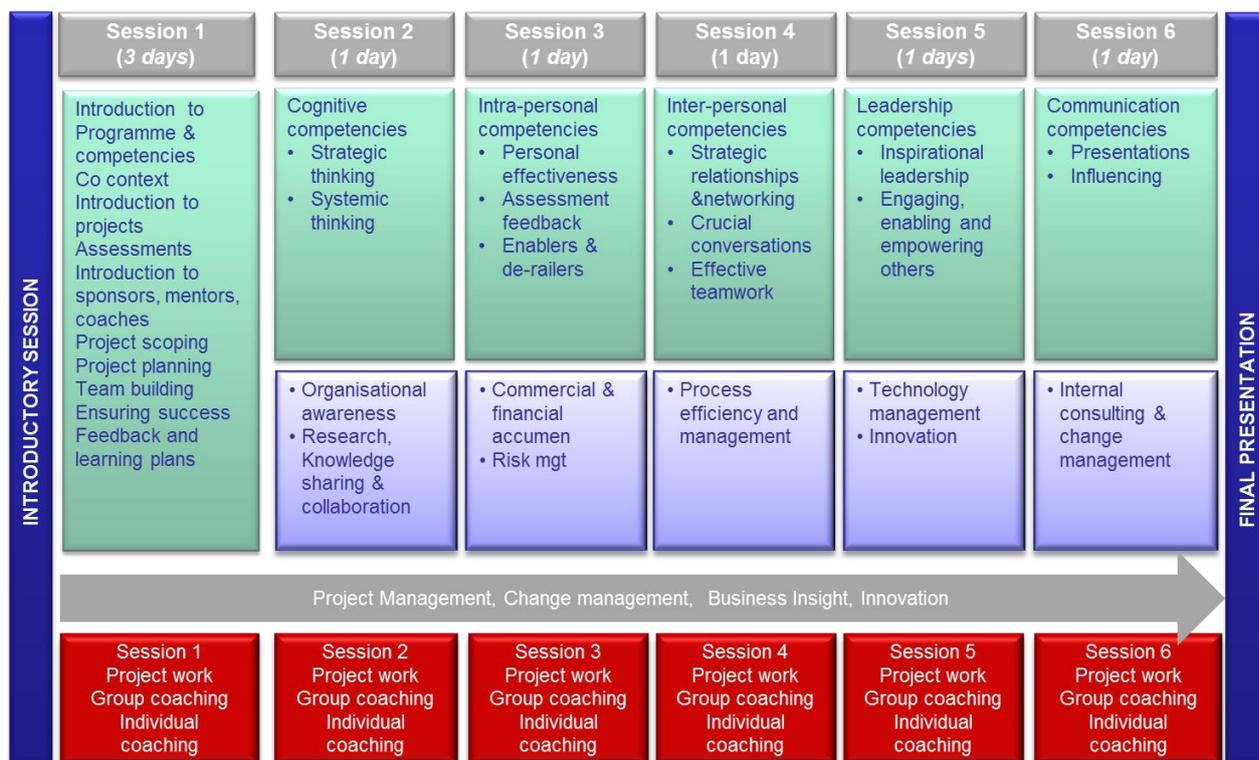
Talented individuals are by nature and nurture bright, fast learners, well-read, exposed to many learning opportunities, busy people and quite concerned (and fussy) with value for time spent. So it was quite a challenge to design something that would be perceived as excellent value, a career enhancing experience, that delivered on exposure to top leaders and influencers and that was interactive and experiential to make the learning meaningful and fun. Gone are the days where a high flyer is willing to sit in a classroom environment and listen to power-point presentations or just plain knowledge or opinion sharing.

The learning environment needs to be stimulating, with a good blend of learning methodologies and technology, with the right level of input and include knowledge sharing, teamwork, collaboration and practice sessions to test understanding and application and to encourage self-awareness and insight. Many talented individuals have a healthy ego (bordering on arrogance) that can prevent an appreciation of personal impact and opportunities for improvement. Individual and group feedback and guided reflection activities are critical for self-insight, boosted with coaches that are able to observe behaviour and give immediate feedback and support.

The selection process was also carefully thought through, with tools and training provided to the senior managers and a full talent review process implemented. We needed to consider the appropriate level of candidate, the diversity and EE talent, what to do about emerging talent, reporting lines and a balance of functions, specialists and generalist leaders in the mix. Other key considerations were career stage, time available (i.e. excluded if completing MBA or other intensive long-term learning program), length of time in the role and capacity to take on the stress and challenge of more late nights and diary shuffling to deliver to multiple stakeholders.

Example of a Breakthrough Learning Program

An overview of the 9 month program is visually depicted below with the groups getting together every 6 weeks or so for learning modules, team coaching and knowledge sharing.



Practical insights and learning

Designing and implementing a Breakthrough Learning program is intensive, complex and involves detailed planning, scheduling and logistics across multiple stakeholder groups. Partnership with a core internal team and effective project and change management is critical for success. Some of the more critical touch points over the life of the programme are identified below.

Talent selection and commitment

The selection of candidates for the Breakthrough Learning Programme included a robust talent review and formal nomination and acceptance process to ensure the right people were selected and that the program carried the appropriate element of aspiration. A combination of an observable portfolio of evidence and objective assessments were used to finalise the candidates. A full battery of cognitive, leadership and behavioural assessments were used with integrated feedback given to each individual. Each of the candidates were also asked to complete a motivation for participating to ensure buy-in and commitment to the full 9 months of the program. Their managers were included in all the communication and initial launch sessions to ensure their commitment to the process as well.

Launch process

The 3 day launch workshop was also important to set the strategic context, demonstrate senior management commitment to the process, outline expectations and competencies, select and develop the teams, scope the projects with sponsors, connect with mentors and coaches, and to start the individual reflection, insight and feedback process through experiential team-based activities and real-time project planning.

Core modules

The core modules were chosen based on priority competencies, observations during the launch process and assessment results. We chose a combination of well-respected internal subject matter

experts for topics such as organisational awareness, commercial acumen, risk management and project management AND external thought leaders and specialists in their field for topics such as research, innovation and process efficiency. Catalyst delivered the personal and leadership development modules and the external individual and team coaching which facilitated an integrated view of each of the participants and a trusted relationship enhancing the learning experience. There were many highlights throughout the program with an overall rating of over 85%, but the greatest highlight was a leadership fireside chat with the CEO, COO and Group CEO where the participants really connected with the human element of leadership with real stories “from the horse’s mouth”.

Breakthrough Project selection

As a key component of the programme, the effort to identify the strategic projects should not be underestimated, and that the efficacy of the projects in providing learning opportunity and delivering results to the organisation are heavily influenced by senior executive involvement and ownership. We arranged regular feedback and presentations at Exco meetings to ensure continued buy-in throughout the process. Involvement of senior sponsors and business owners from the beginning, ensured that the projects moved into implementation or sustainability mode post the program for real business results.

Coaching and Mentoring

The combination of external coaches and internal mentors worked well for providing a safe space for participants to work through tough issues and challenges and unbiased feedback whilst at the same time, provided internal access to networks and experience that greatly assisted the team’s effectiveness in delivering their project on time.

Project and change management

A formal project manager from the project management office was seconded to the project and was responsible for managing the scope, plan, budget and measures of success. A core team with internal specialists and Catalyst consultants met regularly to customise and respond to feedback and changing business needs. The communication element was also important to keep the many stakeholders in the loop including the Exco members, sponsors, business owners, mentors, coaches, line managers, learning and talent teams, HR business partners and participants. This is one area that can never be emphasised enough. A key learning was to send out more regular updates to the line managers, mentors and business owners to ensure a great level of understanding of their role along the journey. Measures also need to be carefully crafted and agreed upfront and tracked. These included before and after competency profiles, engagement scores, performance scores, internal promotions and turnover/retention % of the participants compared to their peers. Each of the strategic projects were also fully integrated into the PMO process with their own business case and ROI tracking.

Conclusion

Overall the participants and executives perceived the program as a very valuable process, with an excellent ROI and recommended it as an annual learning programme going forward. There has been measurable competence improvement and many of the participants have moved into more senior roles or clarified their career expectations through the process. The biggest benefit participants felt was exposure to senior managers and leaders in different functions and across the group and in building networks with peers across the business, leading to expanded career opportunities and options and a better understanding of the business overall. Another key benefit was the realisation of leadership requirements (technical or people leadership) and what they personally needed to practice to become a leader of the future. We also observed a marked improvement in confidence and inter-

personal relating, presenting and influence in the group as a whole. The PMO and talent team will continue to track longer term benefits of the strategic project and talent metrics.

Advocates of BDAL emphasise that “action without learning is unlikely to provide fruitful longer term results, and learning without action does not facilitate change in the organization. So, whether balanced or not there is still a need to have both.

References

Business Driven Action Learning: Global Best Practices; Yury Boshyk; Palgrave Macmillan, 2000

Catalyst Consulting

CATALYST CONSULTING is a specialised consulting and training business with extensive Southern African and international experience in the design and implementation of organisation-wide strategic change and culture transformation journeys, leadership development, talent management, coaching and mentoring, high performance teams and HR capability building.

- ***Our passion*** is enabling leaders and HR professionals in their quest to create high performance organisations in which people can grow and contribute in meaningful ways to their full potential.
- ***Our talent*** is facilitating and stimulating people to shift mindsets, change behaviours and develop skills for real sustainable results.
- ***Our team*** is experienced, creative and committed to help people address the challenges of the complex and dynamic work environment and partner with clients to build capacity for long-term impact.
- ***Our success*** is based on rigorous project and change management, customised solutions, interactive, toolkit based learning and leaving a legacy of confidence and competence.

John and Debbie and our team of experienced associates bring with them, an integrated approach reflecting the realities of corporate life, organisational politics and a deep understanding and experience of the complex pressures and dynamics facing leaders today. They also ensure impact and sustainability through involvement and ownership of clients and participants and a strong change and project management approach to interventions. CATALYST is BEE level 4 compliant.

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