BEST PRACTICES IN EXECUTIVE EDUCATION: WHAT TO CONSIDER

BEST PRACTICE #1: Link program goals to business results

Programs must be linked to specific business priorities and results. Companies need to get beyond vague and generic goals such as improving "leadership" by identifying the specific skills and behaviors that will support the implementation of your strategic goals.

Typically, program content is driven by:

1. A specific strategic initiative (the need for more growth through innovation, for more cross-divisional cooperation, for better cost and expense management, for retaining talent, etc.), and/or
2. A need to develop executive bench strength for succession planning purposes.

Determining the specific skills and behaviors that should be the basis for the program are most commonly accomplished through:

1. Interviews with senior executives, and/or
2. Patterns and trends in performance management data and/or 360 survey data

In our experience, interviews with senior executives are the preferred way to determine needs since the discussions can focus more on future strategic issues, while 360 data tends to have a more narrow focus, is not based on strategic issues, and looks at past performance, not future needs.

Once the developmental gaps are identified, it is important to identify specific measures of success for the program. You need to consider questions such as:

1. After the program is completed, how would you know if it were a success?
2. What different skills and behaviors would you have to observe to know the program was a success?
3. What progress would there be on specific strategic initiatives?
4. How would participants' mindset be different?
5. What impact would the program have on the succession process, turnover, and/or morale?

By determining business-relevant outcomes before the program is designed, you drive:

1. A business case for the program
2. Accountability for the internal and external provider designers of the program
3. Focused learning for the participants
4. Focus and accountability for program faculty

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That is, the program should be designed to deliver specific, observable business outcomes that support a strategic need of the company. Programs should not be an academic experience, but an intervention that supports the execution of your strategy.

Our recommendations:

1. If specific, business-driven needs have not been identified, we recommend starting with a needs assessment that is based on interviewing your key senior executives. The interviews should be semi-structured, with some set questions agreed upon in advance. The results should be discussed with the senior officers. The discussion should not only include the results of the interviews, but also what others in your industry and companies in general with similar needs have successfully done to meet these needs.
2. Once there is consensus on the major strategic developmental needs of the target audience, observable business-related outcomes should be agreed upon.

BEST PRACTICE #2: The "right" people need to be selected as participants

It is important to have the most appropriate people as participants. While this may seem obvious, who should participate should vary with the goals of the program. For example:

1. If one of the major goals is to develop high potentials, then participants should be chosen because of their future potential, not on past performance or because they are at a certain level within the organization. Who is and isn't a high potential shouldn't be a political issue (everyone needs to be at the same level, all divisions should be equally represented), but an issue of potential.
2. If one of the goals is to increase cross-divisional trust and cooperation, then representatives from as many divisions as feasible should attend at the same time.
3. If one of the goals is to have participants apply what they have learned, then only people who can reasonably apply what they have learned should attend. For example, if improving financial decision making is a topic, then participants should have some current (or near term) responsibility for making financial decisions. Otherwise, not only does the program become an intellectual exercise, it can frustrate participants who feel they have learned important models and skills but aren't allowed to use them.

It is important to ask, what are our goals for this program and, as a result, who should and <u>should not</u> be invited to attend.

Our recommendation:

- It is our recommendation that who is invited needs to be discussed and debated. While politics is an organizational reality, the pros and cons of who to invite and why is an important internal discussion. It should be a deliberate, intentional decision and not glossed over. Executive education is a major investment. It should be targeted in such a way as to maximize the investment of your organization's resources.

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BEST PRACTICE #3: The workshop should be highly customized

Program design should vary according to your strategic learning objectives, your culture, the learning style of the participants, as well as the budget and time allotted to the learning experience.

Faculty should be selected according to their ability to teach to the specific business-related goals. Faculty are specialists and tend to teach what they are used to teaching, not necessarily the specific focus you want. In addition, faculty styles vary greatly. It is important, then, to make sure the faculty is a fit for both content and style. As a result, it is important to work with a provider who can select from a variety of business schools, consulting firms, etc. and is not limited to their own organization for faculty.

Learning is maximized when people learn new knowledge, skills or behaviors over a series of workshops and not all at once in a single session. That is, people learn more in a 3-day module followed by a 2-day module than in one 5-day module. Not only do people reach a saturation point in a 5-day module, but a 5-day module does not allow for people to practice new behaviors back in the work setting. Practice and application are key for internalizing learnings and getting people to break old habits. In addition, shorter modules have the advantage of not taking key people away from their jobs for long periods of time. On the other hand, a series of modules can present logistical issues and even budget issues, especially in geographically dispersed organizations.

Executive education programs can range from a highly academic design, focusing mainly on knowledge transfer to a highly consultative design, focusing mainly on the application of skills and behaviors to actual company issues and problems. Programs are rarely purely academic or purely consultative but a combination. It is important to discuss where you want the program to be on this continuum since it has implications for:

1. Methodology (what percent lecture, what percent small group problem solving, what percent action learning projects, etc.).
2. Faculty (what is their style, how skilled are they as facilitators versus lecturer, etc.)
3. Length/time commitment (the more application the more you need upfront time to orient the faculty to your issues, action learning projects require participants to work on projects in addition to their normal jobs)
4. Risk/reward (dealing with real issues is more risky but has a higher potential positive impact on participants and the organization)

It is our recommendation that you use executive education providers that:

1. Understand how adults learn
2. Are knowledgeable in how organizations and people change
3. Have a large diverse faculty network
4. Consider your needs, not the faculty’s specialty as the most important factor in determining what faculty to use
5. Have a understanding of your business and industry
6. Will customize the design to meet your unique needs.

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BEST PRACTICE #4: Follow-up activities are built into program to insure on-going application

Maintaining enthusiasm for the learning generated by an executive education program is a difficult task. Participants often leave workshops highly motivated but quickly lose their enthusiasm for trying something new because:

1. The crush of work waiting for them once they return overwhelms them and leaves them little time to apply what they have learned. It is important, therefore, to build into the program some “homework” or some assignment such as an action learning project that makes them accountable for applying what they have learned. By building follow-up application into the program, it legitimately allows for an opportunity for them to practice new behaviors.
2. They become anxious about trying a new skill or behavior because their performance might suffer. It is natural for one’s performance to decline when trying something new. As a result, it is important for their teams, bosses and HR professionals to be aware of this and support them during this phase of their development.
3. The rest of the organization has not been told about the program and its strategic importance. As a result, often no one, particularly their boss, has any idea what they’ve learned or how it could help the organization. Co-workers may just know that participants have been away from their jobs for 3-5 days and they have been picking up their slack.

One of the effective ways to ensure that participants are able to practice new skills and behaviors once the workshop is completed is to provide action learning projects. An action learning project is a group assignment that allows participants to practice new skills and behaviors while working on a strategically important company issue. These action learning projects are the best way to link classroom and workplace learning. Participants not only learn concepts, they are allowed to practice them by working on real issues in a realistic, yet safe learning environment. In addition, by practicing on true strategic issues, the participants are adding value to the company by working on and solving real issues.

We recommend that:

1. At the end of the final workshop, participants create a development plans that outlines 2-3 actions they will take in the next 2-3 months. The plan should include the specific actions they will take, milestones, and measurable, specific goals they will achieve.
2. These plans should be shared with their boss, who should provide coaching and support, as well as hold them accountable for achieving their goals.
3. When feasible, action learning projects should be a part of the program. They provide a proper balance between development and performance by providing a relatively safe environment for participants to apply new skills and behaviors to real issues.
4. When feasible, individual coaching should be offered to participants. Someone who can provide support and an objective point of view about their developmental issues can help participants gain the confidence they need to risk something new.
5. The purpose of the program should be communicated throughout the organization. In addition, ideally participants will talk about the program and their learning goals with their teams before they attend. Participants could even make their absence a developmental opportunity for some on their teams by delegating specific responsibilities while they are away for the program.

Participants could also discuss with their teams how the program could help the team be more effective (what could the participant bring back to the team in terms of new knowledge, etc.). Attending the program could become a positive experience even for those not attending.

BEST PRACTICE #5: Senior executives must be actively engaged

There is a clear correlation between active senior officer support and program impact. Support could include:

1. Participating in creating the business-related outcomes for the program
2. For high potential programs related to succession and bench building issues, participating in selecting who attends
3. For other programs, approving who does and does not attend
4. When appropriate, help orient the faculty to your organization's culture, strategy and issues
5. When appropriate, lead specific program sessions such as question and answer sessions that allow participants to ask questions based upon what they are learning in the program
6. Being executive sponsors of action learning projects
7. Attending briefing sessions by the faculty so they know ahead of time what new skills and behaviors participants will be learning

The organization must believe that their senior officers are "walking the talk" about the importance of development by being actively engaged in the program and are not just showing up for symbolic ceremonial activities.

In addition, the immediate bosses of the participants must be actively engaged. Their support can include:

1. Participation in attendee selection discussions
2. Meeting with participants prior to the program to agree on developmental goals (what the participant could learn from attending). Setting mutually agreed upon expectations provides focus and motivation for the participant and accountability for both participants and their bosses.
3. Helping participants apply what they have learned by providing appropriate support and opportunities for application.

We recommend that one of the first initiatives should be making sure that your company's senior executives are engaged in actively supporting the program. While full support would be ideal, at the very least, you should know what the level of support to expect in order to manage expectations. The less support, the less likely that the participants will feel supported and apply what they have learned.

BEST PRACTICE #6: Programs should be linked to other talent management initiatives

Executive education programs should be linked to other initiates such as:

1. Leadership succession
2. Coaching and mentoring

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3. Developmental assignments
4. Enhancing bench strength
5. Talent retention
6. Talent acquisition

We recommend that discussions on how the program does or does not relate/support other talent management initiatives should be discussed as the program is being designed. If there are links, then the program needs to be designed to intentionally, and publicly support these initiatives.

For example, combining individual coaching with executive education workshops is an extremely effective way to maximize learning. By meeting with a coach prior to a workshop, participants can explore what developmental areas to focus on while attending. Meeting during and/or after the program can help participants with questions or concerns they have about applying what they have learned.

When appropriate, coaches should attend some or all of the workshop or action learning team meetings. This would enable coaches to:

1. Observe the participant interacting with peers (giving the coach more data about the participant's behavior)
2. Learn the workshop content in order to better coach the attendee
3. Provide real-time feedback and support
4. Help the participant maintain focus and momentum

It should be noted that executive education workshops are meant to be developmental experiences and not to be part of an assessment center. That is, while a goal of a program could be to support a company's succession needs, the program should not be used to evaluate and assess people. If participants believe that the faculty or coaches are there to assess them, they are less likely to be open and honest in class discussions or to try new behaviors. An assessment environment will stifle learning.

BEST PRACTICE #7: Programs should be seen as part of a change intervention, not as a one-time event

One of the powerful benefits of customized, in-house programs is that all the participants will be learning the same models and talking in the same language. By being exposed to new ideas, they may want to challenge the status quo. After all, the program was designed to get people to change.

It is important then that such things as the reward system, the information systems and the organizational structure support what they have learned. For example, if one of the goals of the program was to encourage cross-divisional cooperation, then the reward system must support sharing best practices or talent across divisional boundaries. Otherwise, participants will become cynical about 'the system".

Companies need to realize that if done correctly, executive education programs are really change interventions. They will change the way people will want to behave. Participants will question the status quo.

We recommend that as part of the early discussions about program goals and objectives, you discuss the potential changes that will evolve from the program and how your various systems and process may have to change in order to support and accommodate these changes in beliefs and behaviors.

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