Leaders as Teachers

ACTION GUIDE

Proven Approaches for Unlocking Success in Your Organization

Edward Betof • Lisa M.D. Owens • Sue Todd

Foreword by Kevin D. Wilde, CLO General Mills

“Leaders as Teachers Action Guide is practical, powerful, and profound!”
— Annie McKee, PhD,
Director, Penn CLO Executive Doctoral Program
Welcome to the *Leaders as Teachers Action Guide*. We wish you the best on your journey to inspire your leaders to serve as teachers. It is a strategy that has been proven to drive success for many companies and organizations.

We wrote this book to help you create or expand your own leaders-as-teachers (LAT) learning programs. In our experience, when we enable leaders to lead people through the process of learning and development, great things happen. We share this book with you in the hope that you will have similar experiences.

We see this book as the sequel to *Leaders as Teachers: Unlocking the Teaching Potential of Your Company’s Best and Brightest*, yet it is also a book that stands on its own as a step-by-step guide. It shares not only our own in-depth experience with the topic, but also a wealth of experience from more than a dozen companies that we have interviewed and worked with.

This book is written primarily for the following readers:

- learning leaders, such as chief learning officers, vice presidents of talent development, and directors of leadership development
- members of learning, training, and development teams who will contribute to, and implement, the LAT vision and goals
- business and functional leaders who can selectively use ideas and methods in the book to help them be better leader-teachers and coaches on a daily basis, as well as in the classroom
- HR leaders, especially those responsible for strengthening the organization’s leadership pipeline or cultivating an organization culture of teaching and learning
- past readers who have found value in the LAT book and desire more on the topic.
While this book is a step-by-step guide and starts at the beginning, we recognize that many of you are already well on your way with LAT programs. This book is designed to help you jump into the leaders-as-teachers approach at whatever point best matches your current situation, be it forming (Part I), designing (Part II), or executing and expanding (Part III). Don’t worry about missing something; if it’s critical, there will be specific references to earlier parts of the book to help you move forward quickly.

To start you on your journey, here are a few steps to help you use the book.

**Step 1:** Familiarize yourself with the chapter format. By understanding the layout and icons used in each chapter you can more quickly find what you want when you need it.

**Step 2:** Get an overview. Read the table of contents for a bird’s-eye view, and the description at the beginning of each part to see one level down.

**Step 3:** Read the Foreword by Kevin D. Wilde. Kevin is the chief learning officer for General Mills, selected as CLO of the Year 2007, and formerly a learning leader at GE Crotonville.

**Step 4:** Scan the Terminology section in the Appendix to familiarize yourself with the meaning of words and phrases unique to LAT, such as *go to the light* and *unique leadership perspective*.

**Step 5:** Read the stories at the end for inspiration. Jump to the last chapter, from time to time, to read another LAT success story to keep you inspired on your journey.

We wish you great success and invite you to share your successes with us and others, using any social collaborative method in your toolkit. Together, we will all continue the learning journey.

Sincerely,

Ed, Lisa, and Sue
Chapter Format

Each chapter has a similar layout and icons to help you quickly find just what you want when you need it.

**In Every Chapter**

Each chapter starts with Find Your Answers and ends with Your Turn.

**Find Your Answers**

This short list of questions can help you focus on applying concepts in the chapter to your unique situation. These questions are reprised in Your Turn.

**Your Turn**

At the end of each chapter, this set of questions can assist you as you reflect and apply what you have been learning.

**Throughout the Book**

Throughout each chapter, watch for these icons for content that is the most relevant for you. These include:

**Learn By Doing**

Don’t skip these! They are loaded with content, and are mini-examples of active teaching. These sections will help you apply what you are learning, and in doing so, deepen your understanding.
Learning From Leader-Teachers provides a wealth of perspective and stories from leaders who are teachers.

Insights From Learning Professionals shares stories, advice, and insights from leaders of learning organizations who have successfully guided leaders-as-teachers programs.

Science Notes gives insight into relevant behavioral science and neuroscience research.

Quick Tips are practical, simple hints, tips, and proven creative suggestions.
Part I

Framing a Leaders as Teachers Approach for Your Workplace

Part I guides you to structure your leaders-as-teachers (LAT) initiative at a high level using three steps: confirm why the LAT approach is right for today’s business, choose what to build, and identify who should build it.

Chapter 1: Leaders as Teachers—Today’s Imperative

Get grounded in the documentation and research demonstrating the benefits of the LAT approach for today’s businesses. Weave this into your own LAT initiative proposals and discussions.

Chapter 2: Choose Your Starting Plan

Map out your LAT starting plan with considerations for business drivers, vision, scope, and how to build internal support. Select an initial structure for delivery and governance.

Chapter 3: Form Your LAT Team

It takes a team and leadership to achieve a successful LAT culture. Gather your team, lead them, and ultimately, grow them using progression plans.
Chapter 1

Leaders as Teachers—Today’s Imperative

“The conductor doesn’t make a sound. The power of the conductor is derived from making other people feel powerful.”

—Ben Zander, conductor of the Boston Philharmonic and author of *The Art of Possibility*

Find Your Answers

Increasingly, organizations are turning to a wide variety of leaders-as-teachers approaches. As you read, think about your answers to these questions:

- Which of the seven cornerstone LAT principles are relevant for your situation?
- Which of these elements will help you engage others in the LAT approach?
  - historical basis of leaders as teachers
  - evidence and experience
  - professional examples
More than ever the CEOs, boards, and executive teams of highly successful companies and organizations are focusing on their talent management, learning, and leadership development practices. The goal of these talent management and leadership development efforts is to ensure that engaged and effective leaders and professionals are in key roles now and in the future. A vital method adopted by many of these organizations is the practice of leaders developing leaders—serving as teachers, coaches, and mentors. How to best implement such a practice is the focus of this Action Guide.

The *Leaders as Teachers Action Guide* is based on seven cornerstone principles:

1. **One of the best ways to ensure top and bottom line growth is to continuously develop strong leaders and professionals.** Talent development and having a robust talent pipeline is an irrefutable winning strategy of best practice companies. These companies think and act on their top line, bottom line, and talent pipeline. Effective leadership is the best insurance for business success and sustainability. Besides the obvious advantages of having strong leaders versus poor or dysfunctional ones, stock market analysts place significant value on effective company leadership. Essentially, they reward effective leadership at a premium. Analysts also penalize companies for having ineffective leaders and leadership practices.

2. **The organizations that utilize a LAT approach provide themselves with a distinct competitive advantage.** The LAT approach:

   - helps to drive business results and company value
   - stimulates the learning and development of leaders and associates
   - improves the leadership perspective and skills of those who teach
   - strengthens the organizational culture and communications
   - promotes positive business and organizational change
   - reduces costs by leveraging top talent, especially when guided by skilled learning leaders and professionals.

3. **Exemplar companies are made up of leaders at many levels who teach very effectively in the moment, as well as in learning programs.** These leaders teach, coach, and often serve as mentors to others. Who better to be the role models and teach or co-teach the company’s strategy, values, culture, and competency priorities? Top-notch development of talent is a key predictor of sustained
business success and operational excellence. “First who, then what” is one of the most instructive findings in Jim Collins’s landmark Good to Great and Great by Choice research (Collins 2008; Collins and Hansen 2011). Leaders are those who show the way forward.

4. **The practice of leaders serving as teachers is a time-tested, centuries-old concept that has great relevance for today’s organizations.** The long history of how experienced leaders teach, coach, and mentor others serves as a compass for us. Sharing the wisdom, perspectives, and values of those who have learned from experience can provide lessons that should not be lost by any organization. In a similar way, this guide has dozens of practical ideas, activities, and practices that come from what companies and organizations have learned during their LAT journey. These are companies we have studied, consulted, or worked in ourselves. Their business and functional **leader-teachers** and their learning leaders have generously shared their experiences with us so others can benefit.

5. **All organizations can implement a LAT approach in some shape, size, or form.** What is right for one company may not fit for another. Some organizations can go large-scale comparatively quickly, while other companies should take small and slow, incremental steps. The Leaders as Teachers Action Guide is written as a practical, hands-on resource. It is designed to help organizations, learning executives and professionals, and leaders at many levels to effectively implement or strengthen their LAT approach in a manner that will work in their organizations.

6. **Active or experiential teaching and learning is what makes the process come alive and have real impact.** There are many ways to avoid “death by PowerPoint syndrome.” **Active teaching** not only improves learning and increases the likelihood of learning transfer, it makes teaching and facilitation enjoyable and a valued activity for leaders. As a result, leaders frequently ask to teach in future programs.

7. **Learning leaders and professionals have an essential role in the leader-teacher process.** They show the way. They are change agents necessary for the LAT approach to be successfully implemented. They frequently teach with leader-teachers and help them be the “stars.” Learning leaders and professionals prepare leaders
in a wide variety of ways and serve as program designers and, sometimes, instructional technologists. This Action Guide is designed with learning leaders and professionals in mind. The model of concept to idea to application can be found throughout.

Learn By Doing: Historical Leaders

- Great philosophers such as Plato, Aristotle, and Socrates from the Golden Age of Greece
- Elders, shamans, or medicine men from early native civilizations
- Leaders of the great religions over the centuries
- Artisans or skilled craftsmen beginning in the middle ages
- Leaders of scouting groups such as Girl Scouts, Boy Scouts, and 4H
- Labor union craft masters and foremen
- Experienced physicians and nurses throughout the history of medical education
- Senior military and law enforcement personnel
- Contemporary business leaders in selected high-performance companies
- Great educators in elementary school through university
- Athletic and performance arts coaches
- Sage friends and trusted advisers
- Loving parents and grandparents

What do the above individuals, groups, and professionals have in common?

The Historical Perspective

The common element for every person in the Learn By Doing activity is that they are examples of leaders who have served as teachers, coaches, and sometimes mentors. They have helped and guided others’ development. They have taught important lessons, provided a brain to pick, an ear to listen, and sometimes a push in the right direction.

Leaders have served as teachers, coaches, and mentors for centuries in civilizations around the globe. Elders taught the basic means of survival, customs, and traditions to the young. The great religions passed their teachings from one
generation to another. From these teachers, leaders emerged and continued the cycle of teaching, learning, surviving, and thriving.

This brief history lesson is a window into the importance, dynamics, and staying power of successful teaching experiences. It provides insight into several key characteristics of excellent leader-teachers and coaches. They share knowledge, experience, perspective, and counsel and are sensitive to others’ needs and personalities. Commonly, this enables them to be viewed as positive role models. They are able to establish, build, and sustain supportive, trusting, and confidential relationships. In short, the best leader-teachers are trusted advisers who create opportunities for learning, growth, development, and positive change in others. The examples of individuals, groups, and professionals listed in the activity are models of these characteristics.

Now dial forward from the ancient civilizations to today’s complex organizations with their need and inherent competition for talented leaders. Leaders who serve as teachers and coaches are vital organizational resources. They support the development of current and emerging professionals, managers, and executives. The use of leader-teachers can be a highly effective leadership development strategy.

Leader-teachers are highly valued in many contemporary businesses, government, educational, and human services organizations. However, despite the demonstrated and time-tested value of leaders serving as mentors and teachers, many organizations place themselves at a competitive and talent disadvantage by failing to utilize these developmental resources. These leaders are typically experienced, motivated, and highly engaged. Not making use of their experience and expertise can be a lost developmental opportunity for many organizations (Betof 2010).

**Leaders as Teachers Examples**

Throughout this Action Guide we will refer to many company and organizational practices. These range from teaching in executive and leadership programs to using social media to communicate and teach across large sectors of employees. Some companies such as GE, Honeywell, P&G, Boeing, 3M, and General Mills were early adopters. Other companies such as Banner Health and SES have more
recently leveraged their leaders in teaching roles and are just realizing the important benefits. BD not only utilizes their leaders around the world to teach in their corporate university, but has also used them as expert facilitators leading business and organizational strategic profiles for over two decades. Organizations such as the Y, Scouts, and 4H have used the approach for staff development, cultural orientation, and the learning and achievement of its members for generations. The military and law enforcement have used their experienced leaders to develop future leaders, in some cases, for centuries. Physicians are developed around the world using the adage, “see one, do one, teach one.”

Figure 1.1 lists a sample of companies and organizations across many sectors that use the LAT approach.

**Insights From Learning Professionals**

“I conducted a working session in January 2012, for the purposes of moving forward with the content for a strategy course, which our executives would facilitate. I set up a meeting with the CEO, his direct reports, and the key people who were creating the strategy plans. So there were at least a dozen executives in the room. I had all the PowerPoint slides for the course printed out on the wall and walked them through each slide. It soon became clear to the CEO and the chief development officer that the colleagues in the room were not completely aligned with various important elements of our company’s strategic plan. This was partly due to acquisitions of several companies over the past few years. The course design became a catalyst for the internal alignment process. Over the next weeks, the CEO and executives met separately and worked through their differing points of view so that the new course would truly reflect the corporate strategy that all our executives were now pursuing. This is just one example of how the LAT approach provided a very substantial benefit to our business.”

—Doug Clayton, Senior VP of HR, SES


**Figure 1.1 - Sample of Companies and Organizations That Use the LAT Approach**

<table>
<thead>
<tr>
<th>Accenture</th>
<th>Dell</th>
<th>McCormick</th>
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<tbody>
<tr>
<td>Agilent Technologies</td>
<td>Deloitte</td>
<td>Merck</td>
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<tr>
<td>Alcoa</td>
<td>Defense Intelligence Agency (DIA)</td>
<td>Monsanto</td>
</tr>
<tr>
<td>Ameriprise Financial</td>
<td>GE</td>
<td>Novellis</td>
</tr>
<tr>
<td>Banner Health</td>
<td>General Mills</td>
<td>Procter &amp; Gamble (P&amp;G)</td>
</tr>
<tr>
<td>BD (Becton, Dickinson, and Company)</td>
<td>Hess</td>
<td>Raytheon</td>
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<tr>
<td>Boeing</td>
<td>Honeywell</td>
<td>Signature Healthcare</td>
</tr>
<tr>
<td>Caterpillar</td>
<td>HP (Hewlett Packard)</td>
<td>Southwest Airlines</td>
</tr>
<tr>
<td>Chevron</td>
<td>Kaiser-Permanente</td>
<td>UPS</td>
</tr>
<tr>
<td>Central Intelligence Agency (CIA)</td>
<td>3M</td>
<td>Wolterskluwer</td>
</tr>
<tr>
<td>Children’s Healthcare of Atlanta</td>
<td>McCain-Foods</td>
<td>Y of Central Maryland</td>
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</table>

**Evidence and Experience Suggests**

There is an evolving body of evidence that suggests business, organizational, and individual value is realized when leaders serve as teachers. The following is a sample of current research on the topic. It is presented within the broader context of the importance that CEOs, boards of directors, and analysts currently place on human capital and strong company leadership.

**Results From a 2013 Leaders as Teachers Study of the Conference Board Councils**

In 2013, the authors administered a survey to three of the Conference Board councils. These councils are comprised primarily of the senior leaders of talent, learning, organization development, and leadership development of their respective companies and organizations. Participation was voluntary.

The following is a summary of the key findings from 22 participating companies.

- **Widespread Use:** About 90 percent of responders reported using a LAT approach for in-house leadership training programs. Additionally, nearly 30 percent use this approach for technical or business function training. About 15 percent are currently updating or expanding their LAT programs.
- **LAT Program Benefits:** When asked what benefits are derived from using a LAT approach they told us the following:
  - 70 percent volunteered that LAT contributed in a significant way to the development of employees and emerging leaders.
  - In 60 percent of the companies, LAT programs are viewed as helping to strengthen organizational culture and communications.
  - 50 percent said the program helped the leader-teachers themselves develop and improve.
  - 40 percent volunteered that the LAT approach is a key to driving business results and strategic alignment.
  - 40 percent commented that LAT is an aid to succession planning and career development programs.

- **Measuring Impact:** When asked about measures that demonstrate the impact of LAT programs, 65 percent reported using Level 1 evaluations to assure quality and drive improvements. Most reported very strong anecdotal evidence of the positive impact LAT has on learning and application.
  - 30 percent of respondents report having done studies or scorecard analyses that demonstrate the value of LAT over non-LAT training programs.

The results of this survey suggest that the LAT approach has gained significant ground as a beneficial method for training and developing employees and the next generation of leaders. LAT supports business results and strategic alignment and furthers a company’s culture and communications (Betof and Owens 2013).

**Results From a 2013 Research Report Published by The Conference Board**

The detailed 2013 study *The DNA of Leaders: Leadership Development Secrets* examined 19 companies that have been recognized as exemplar and top award winning organizations for their practices in developing leaders. Amongst their many findings was the trend that chief executives are helping to redefine notions of leadership. There has been a distinct shift away from standardized (often external, business school-centered) programs toward customized (often in-house, company-specific) programs that feature action learning as an important component and are tightly
focused on nonnegotiable company values. Most interviewees stressed the importance of having senior leaders heavily involved in the design and execution of their programs and, 16 of the 19 human capital survey respondents said their CEOs were highly involved in senior programs (Ray and Learmond, 2013).

Results From a 2010 Research Report Published by the Human Capital Institute (HCI) and Lee Hecht Harrison

In the report, *Leaders Developing Leaders: Capitalizing on the Demographic Gift to Revive Your Leadership Program*, a survey of 35 items was distributed to approximately 10,000 HCI members. Completed surveys were received from 412 different organizations. In addition, several in-depth interviews were conducted with leadership development thought leaders from top leadership companies. To supplement the primary methods described above, HCI researchers also reviewed relevant information from a variety of secondary sources, including whitepapers, articles, books, interviews, and case studies. Highlights of this research include:

- Over the past few decades when organizations have implemented Leaders Developing Leaders programs effective implementation has led to increased employee engagement, increased productivity, and a stronger network and supply of organizational leaders.
- Succession planning, employee satisfaction, and company profitability have correspondingly increased with the successful implementation of strong leadership development programs with Leaders Developing Leaders at their core.
- More than half of survey respondents agreed or strongly agreed that current leaders in their organization postponed their retirement plans as a result of the recession. With the delay of senior executive retirements comes a demographic gift. This allows organizations to have additional time with seasoned executives and recruit them to actively participate in Leaders Developing Leaders programs before their retirement plans resume.
- The top three benefits companies derive from Leaders Developing Leaders programs are that they instill leadership values and skills, strengthen organizational culture and communication, and help drive business results by ensuring strategic business alignment between senior and emerging leaders.
• Of the companies surveyed, 40 percent of organizations subscribe to the philosophy that “All leaders are expected to teach and coach emerging leaders.”

• In addition to several selected competencies and capabilities, the two most important criteria that should be used for selection as leader-teachers, as chosen by respondents, are leaders must be role models (81 percent) and leaders must have proven performance in the organization (73 percent).

• When companies struggle to implement a Leaders Developing Leaders program, it is often because of issues such as availability of time, accountability related to teaching and coaching, lack of proper skills and knowledge to teach, and lack of appropriate infrastructure and consistent leadership development strategy (Human Capital Institute 2010).

In the overview of the leadership development techniques section of the 2011 report, LAT was used by 76 percent of the top global companies for leaders.

—Aon/Hewitt 2011

Results From a Doctoral Thesis Study

In a 2010 doctoral thesis at the University of Pennsylvania, Joseph Steier, CEO of Signature Healthcare, explored the concept that knowledge and application of theories, principles, and methods of adult learning to teaching may be a core management competency needed for companies to improve employee reaction to learning, knowledge transfer, and behavior, as well as engagement, retention, and profitability.

The literature review and conceptual framework for this dissertation centered on the growing research termed “leaders as teachers” and further defined teaching competencies for leaders through a set of adult learning theories, principles, and methods. The application of this idea was tested through the creation and deployment of Signature Healthcare’s educational training program for managers, which included web-based modules and activities linked to principles and methods of adult learning, learning styles, facilitation versus traditional teaching, effective teaching methods, improved communication, establishment of learning cohorts, and application and demonstration of teaching skills. To assess its impact on improving workplace learning and performance within the subject
organization, a randomized experiment was conducted in which individual and organizational performance was evaluated using Kirkpatrick’s Levels of Evaluation as the theoretical framework. The researcher examined how the new teaching competency for managers impacted the reactions to learning (Level 1), knowledge transfer (Level 2), key individual behaviors (Level 3), and collective operational performance including employee engagement, retention, and overall company profitability (Level 4) when managers deployed this new teaching competency within the normal course of business in the workplace. This competency extended from the formal training situations to all activities of daily business. Having this teaching competency eliminated the dependency on the corporate learning and development department for training materials and directives, which reduced costs. Further, Steier found that the leader-teachers improved their performance over time. Training that incorporated the new competency improved participant reaction to training, increased knowledge transfer, changed employee behavior to reduce resident falls, and positively affected aspects of employee engagement. Employee retention improved, and when applied to the entire organization a cost savings of $1.9M was realized (Steier 2010).

Developing Leaders in High-Tech Firms: What’s Different and What Works

A 2010 research article by Robert Fulmer and Byron Hanson summarized how to develop leaders in 23 high-tech firms. In part, it concluded:

- An overwhelming majority (89 percent) said that developing leaders is an area of increasing importance.
- More than half (58 percent) reported that their senior management believes that the development of leaders is a high or very high priority.
- While respondents were confident that their firms are headed in the right direction, few are satisfied with their current level of success and professionalism.

Amongst their suggestions, based on the success of other large high-tech firms, was to engage executives as teachers and facilitators who add value through their experience, observation, and feedback. Another recommendation was to leverage peer coaching, which is another form of leader as teacher, as a practical and receptive method to developing coaching capability (Fulmer and Hanson 2010).
Overview of the Action Guide

This action guide is the follow up to the book *Leaders as Teachers: Unlock the Teaching Potential of Your Company’s Best and Brightest*, which was published in 2009. The book describes “what” to do, both on a broad scale and at a detailed level, through the use of case studies, checklists, and creative suggestions. It also provides a high-level “how” to do it that the Action Guide takes to the next level of specificity. The LAT Action Guide incorporates lessons we have learned, especially in the five years since LAT was published. Importantly, we have had access to more than 25 companies and organizations that currently have active leaders-as-teachers processes in place.

The overarching success formula is not complicated. Simply stated, winning companies simultaneously focus on strategies that grow their top line, bottom line, and talent pipeline.

The leaders-as-teachers approach has become an important factor supporting each of these three areas, which are vital for success in a very wide cross-section of today’s businesses and organizations. What began as a custom of elders transmitting rituals, values, and stories centuries ago has evolved into powerful leadership, teaching, cultural, and communication assets for contemporary organizations.

Your Turn

Jot down your thoughts on the following topics.

What aspects of the seven LAT principles are relevant to your situation?

__________________________________________________________________________________________

__________________________________________________________________________________________

What will help engage others in the leaders-as-teachers approach from (a) a historical perspective, (b) evidence and experience, and (c) company and organizational examples?

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