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Leaders Teaching Leaders

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As organizations leverage the valuable experience of their leaders as teachers, they should implement an instructionally sound framework that addresses the technical and emotional needs of all stakeholders.

You've been trying to convince your senior leaders for some time now that they have much to offer in teaching other leaders in your organization. By actively sharing their experiences and perspectives on the company's values and expectations, they send an unmistakable message of commitment to the company's success and to growing its leadership pipeline.

Now you've finally gotten your chance. You are sitting across the desk from one of those executives, who has agreed to participate in your newly developed high-visibility senior leadership academy as a presenter. You're simultaneously excited and terrified: excited because you know the value that executives can bring to the program and terrified because you want to have a highly engaging learning experience, not a death-by-PowerPoint presentation or an unfocused stream-of-consciousness agenda.

Sure, many executives have risen to the top because of their ability to charismatically communicate and present to their teams, boardrooms and customers. But can they facilitate a real learning experience?

There are really only two factors that will influence the success of a leaders-teaching-leaders initiative. The first involves the creation of a simple, adaptable framework that facilitates the type of breakthrough learning experience you desire. The second factor addresses the emotional element of making executives comfortable doing something that may not come naturally: truly engaging the leaders in their audience.

Not Presentation Skills

With some direction, executives can learn the basics of creating engaging, meaningful and action-oriented learning experiences based on any content they want to present. Now, this isn't about teaching presentation skills. We assume these leaders already know how to present, as it's something they've likely been doing for years. This is about learning to facilitate a session that participants will remember and internalize.

That said, we recognize that senior executives aren't going to sit through a course in instructional design — nor should they. But they would benefit significantly from being introduced to an instructional design "lite" model that wouldn't take that much time to understand and apply, but would yield concrete results.

Such an instructional design "lite" process includes the following six phases.

Phase 1: Content Mapping

This phase involves identifying, organizing and sorting out the relevant content to be communicated in the session. Internal and external sources for the information are first determined and then accessed in order to be mapped. This mapping process classifies the content into one or more of the following three areas:

- Knowledge, or the information one needs to know about the topic.
- Skill, or the ability one needs to demonstrate about the topic.
- Attitude, or those beliefs one has to embrace about the topic.

Leaders tend to know what they want to say but sometimes need an organizing framework to make the information meaningful to their audiences. This simple threefold approach allows them to create relevant and concise information. They also need to not only identify lessons learned from previous experience but create a story around their teachable point of view, which then can be mapped by the knowledge, skills and attitudes that story communicates.

Phase 2: Learning Objectives

Based on the content identified in Phase 1, specific learning objectives are created describing the intended and expected outcomes that will be addressed. These are aligned with the content classifications from Phase 1 such that the following questions can be answered as a result of participation in the session:

- What do learners know now that they did not know prior to the session?
- What can learners do now that they were not able to do prior to the session?
- What do learners believe that they did not believe prior to the session?

Phase 3: Instructional Design

Based on the desired learning outcomes identified, create an initial teaching process in the form of a high-level design document. The format for this design resembles teaching notes that, when finalized, are used by the leader to instruct the session. This process takes into account the level and experience of the learners, the audience size, the specific business context involved and the desired learning objectives.

The methodology used involves three key elements: the "what," the "so what" and the "now what."

1. The "what" refers to the content that will be discussed. It revolves around the mindset required to learn the intended topic or point.
2. The "so what" provides context for learners and helps them understand how they will need to apply the content in their specific job roles. It focuses on the skill set required to apply the content.

3. The "now what" addresses the application of the content — helping direct reports, managers and others become more effective. To apply the skill sets developed, leaders now need an appropriate tool set designed specifically to address their business challenges.

Phase 4: Materials Development

Once the overall session's instructional design has been completed, learning executives can work on developing the most appropriate learning experiences to convey the necessary information. This can be facilitated by matching intended learning outcomes with appropriate learning strategies (Figure 1). Then, all the materials for the session — such as reading materials, tools, workbooks, PowerPoint presentations and teaching notes — can be developed.

FIGURE 1: MATCHING LEARNING OUTCOMES TO LEARNING STRATEGIES

LEARNING OUTCOMES	LEARNING STRATEGIES
Mindset	Presentation Cases Assessments Videos Discussion
Skill Set	Dialogue Simulations Role-play Feedback Reflection
Tool Set	Action planning Job aids On-the-job assignments Tests

Phase 5: Module Delivery

Prior to the actual delivery of the session, conduct a practice walk-through with a small group of colleagues who provide feedback on the teaching process and materials. All revisions should be made prior to a final printing and delivery of the session.

Optional Phase 6: Cascading Rollout

Once the initial session has been delivered, CLOs might want to implement a process to teach participants how to deliver the module to their own direct reports, thereby extending the leaders-teaching-leaders model. Given that these learners are already familiar with the content and delivery, a working session can be organized for all interested to review key elements, answer questions and practice delivery.

This six-phase approach is easy to implement and combines the science of learning with helping the executives become emotionally comfortable with developing others. Once they have applied this approach, they should be able to do it on their own the next time around. True, the learning executive may have to co-facilitate a session at first, but over time, these leaders will become more and more comfortable with the continued success they are having. Furthermore, those learners seeing this approach modeled by their senior executives can even more quickly understand its benefits and follow it when creating their own leaders-teaching-leaders sessions.

A Few Final Tips

When working with executives, CLOs would do well to keep the following in mind.

1. **This has not been their job.** While they have been successful at telling and selling, facilitating a learning experience is likely to be out of their comfort zone. Therefore, provide them with a simple framework that engenders their confidence. It's your job to bring them to their conscious competence.
2. **It's their style, not yours.** Encourage them to use their own words, provide their own perspective and articulate their own points of view. A "facilitator" outline can help keep them on track and even a sample script could assist, but allow them the space to work within their own structure.
3. **They must "own" their content.** They need to believe in what they are teaching if they are going to effectively model and influence other leaders. In fact, minor flaws in their facilitation skills will likely be forgiven if they are passionate owners of their content.
4. **You are the learning pro.** As such, you must offer a collaborative and competent approach. Leaders will look to you for help, so don't back down from a framework you know will work. Having said this, you need to demonstrate your confidence and business savvy, so avoid using learning and development jargon.

The approach described in this article provides a framework that replaces the oft-dreaded uninspiring executive presentation with an engaging, relevant and impactful learning experience. CLO

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IN PRACTICE EXECUTIVE TEACHING AT GENERAL MILLS

General Mills has taken a leaders-teaching-leaders approach for many years, starting with the company's Leadership Institute. These programs involve executives teaching and communicating through the ranks corporatewide initiatives on building culture and ethics.

Some years ago, General Mills identified two strategic goals that it wanted all its leaders to work toward: cross-functional collaboration and speed in decision making.

To do this, the organization prepared its office of the chair — which consisted of the CEO and his two most senior direct reports — to deliver these messages to the company's senior leaders. While ultimately successful, the initiative did not have a specific format or include instruction on how to most effectively deliver this content. Further, the absence of standardization made it more difficult for a consistent message to cascade through all levels of the organization. Essentially, executives were left to their own devices.

General Mills decided it would benefit from implementing a framework for this leaders-teaching-leaders initiative and piloted it with the senior vice president of human resources. A four-hour interactive workshop was created from what was originally a 60-minute presentation on the link between management behaviors and employee morale and productivity. The challenge was not only to present this research but also to enable leaders to embrace and actually perform the behaviors that would yield positive results.

To get the ball rolling, the General Mills learning team engaged in a mapping process that consisted of taking specific steps to achieve outcomes in the following three areas:

1. Know:
- That great leaders do three things: invest, value and stretch their managers.
- That being a great manager is more than just having skills; it involves differential utilization to drive energized commitment.
- One's own level of greatness.

2. Do:
- Coach managers on how to be great.
- Execute on assessment feedback action plans.

3. Believe:
- That great managers drive and energize their employees.
- That General Mills is committed to its managers getting better.
- That it is the leader's job to develop managers.

Once this process was completed, the team was able to build the content for the program. Several iterations of this process took place in PowerPoint-slide format. The team looked at the session outcomes and began to design ways to instructionally achieve them — that is, they aimed to match the message to the learning method most likely to achieve it. For example, for "know" outcomes, this meant information should be distributed through facts and figures. For the "do" outcomes, this involved creating learning exercises to assess and teach certain skills. For the "believe" outcomes, a combination of information, discussion and action-planning commitments were integrated. At the end of this process, General Mills had developed a series of activities that blended to form a cogent and relevant learning experience.

The team then worked to create comprehensive leader notes. Each slide garnered its own set of notes, which was divided into two sections: one for what the leader could say and one for what the leader could do. Both were positioned simply as guidelines, as leaders were expected to use their own words in communicating the various messages and content.

The learning activities included the presentation of relevant business data both from within and outside of General Mills; reviewing previously assessed 360 data; recollection, storytelling and listing of great manager attributes; identification of personal strengths and areas for improvement; opportunities to speak with fellow learners to improve their management behaviors; opportunities to observe direct reports to provide timely and fact-based feedback; action planning; and ending with a personal "legacy" story of great management.

Throughout the session, the leader would be encouraged — via the leader notes — to ask for questions and seek understanding of all the learners through extensive continuous discussion on these activities.

Unique to this approach was a two-page "great manager development map" that served as a workbook for recording the learner's lessons and action plans, although the presentation slides were provided to the learner for reference.

After the session, all of the participants were asked to take the experience to their direct reports and all of them felt they could do so. Based on their feedback, the pilot was a success. CLO

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