



Accelerated Leadership Development

Overview

Johnson Controls International (JCI) touches the lives of millions of people worldwide. JCI protects schools, hospitals, airports, and 30% of Fortune1000 companies, by ensuring their security, fire and air systems deliver healthy and comfortable environments that increase work productivity and job satisfaction.

Sustaining JCI's success depends on securing a strong pipeline of future leaders. They were helped to recognise the value of taking an evidence-based approach to achieving this. And, working with Business Psychologists, the pilot of their new Talent Acceleration Programme not only delivered on their objective, but also paid for itself nine times over!

Challenge

Each year JCI identified a group of potential leadership talent, 'future leaders.' JCI retained Business Psychologists from PMSL to deliver a rigorous development Programme to ensure these potential leaders progressed in readiness to take on more significant roles.

The requirement was to use evidence-based Business Psychology techniques to design and pilot a bespoke Talent Acceleration Programme that would ensure a pipeline of world-class leaders. The Programme needed to:

- Enable Participants to develop the skills needed to become the next generation of leaders at JCI
- Represent externally benchmarked quality, validated by a recognised authority
- Deliver a return on investment of at least 200% within the first year

At the time of engaging the Psychologists to support the first group of Participants, only 36% were rated 'Good' or 'Excellent' by their Managers. They were to undertake an 18-month Talent Acceleration Programme to help them demonstrate their leadership potential.

Stakeholder Support

The Business Psychologists adopted a partnership approach with their primary stakeholders (the Learning and Development Manager, Country Managers, and Talent Manager) in order to get buy-in to their approach.

Despite requesting a state-of-the art Programme, the client did not immediately embrace the evidence-based approach the Psychologists promoted. This meant they had to start with challenging long-held perceptions of popular content (such as Neuro-Linguistic Programming (NLP)), encouraging stakeholders to examine evidence for techniques more closely.

They overcame this challenge by taking a simple, logical approach, asking the following questions of every model or technique proposed:

- What do you want to achieve?

- How will [that approach] achieve that?
- How do you know? (What evidence is there?)

By focussing attention on the overall goals and assessing evidence for how well all proposed content would achieve the goals, stakeholders could distinguish between popular ideas and evidence-based approaches. This eliminated requests to include less effective non evidence-based content. And, from there, they gained strong commitment to the Programme design.

Approach

Business Psychology Models

A number of models were referenced in defining the learning approach used, including:

- Kolb's experiential learning theory suggests, "Learning is the process whereby knowledge is created through the transformation of experience." Kolb published a model in 1984 which described a four-stage cycle of learning and four separate learning styles. The Business Psychologists therefore advised, for effective learning, people would require time to absorb new information, use it experimentally and integrate it with their existing knowledge. And they ensured Participants would have opportunities for skills practise with feedback and reflection, to embed new skills at work
- Gobet & Simon (1996b), researched memory in expert Chess Players and found relevant information often stored in 'chunks,' and recognition of familiar situations ('chunks') made them easier to recall. Individuals with a larger repository relevant information to reference had better recall ability. In view of this, the Business Psychologists wished to ensure learners would recognise familiar elements in their training
- British psychologist Sir Frederic Bartlett proposed that people have schemata, or unconscious mental structures, that represent an individual's generic knowledge about the world. It was through schemata that old knowledge influenced new information. And, in the absence of all information, individuals filled in the gaps to make more sense of what happened, based on their own experience. Subsequent studies, of eyewitnesses' memory sourcing and recall, showed familiarity impacted upon the effectiveness of memory recall. (Memon, Bartlett, Rose & Gray, 2003.) It was thus proposed that embedding new learning within familiar settings could reduce resistance and improve incorporation of the information
- A theoretical framework, shared by K. Anders Ericsson and colleagues, addressed Deliberate Practice. They explained how expert performance was an end-result of individuals' prolonged efforts to improve performance while negotiating motivational and external constraints. Effortful activities (Deliberate Practice) could be designed to optimise improvement. They showed how many characteristics once believed to reflect innate talent were actually the result of intense practice, offering unique evidence on the potential and limits of extreme environmental adaptation and learning (Ericsson, Krampe & Tesch-Romer, 1993)
- Burrhus Frederic Skinner (more commonly known as B.F. Skinner) created models of operant conditioning as a method of learning that occurs through rewards and punishments for behaviour. Through operant conditioning, subjects (typically animals) made an association between a particular behaviour and a consequence (Skinner, 1938 and 1948). More recent studies using Skinner's approach (with the

'Skinner box') have demonstrated similar results rewarding pigeons for identifying artists' paintings (Watanabe, et al., 1995). The Business Psychologists considered the application of this in context of practice and reward in shaping behaviour, and allowing for practice and praise

- Behavioural Skills Training (BST) is a teaching package proposed by John Ward-Horner and colleagues, combining several methodologies that, when used together, are effective in teaching a broad range of skills (Ward-Horner & Sturmey, 2012). At a basic level this proposes that training includes
 - Instructions
 - Modelling
 - Rehearsal
 - Feedback
- Eric Jensen demonstrated increased learning through emphasis on multiple pathways, that form the networks of brain cells associated to a specific concept. In context of learning this showed the importance of review, repetition and reinforcement for building robust networks/learning. Jensen suggested using probes (before lesson) and checks for understanding (after lesson) to improve personal insight and, therefore, learning, retention and recall (Jensen, 2005)

Business Psychology Applied

Because people tend to have better recall for familiar information/situations, the Business Psychologists designed the training elements of the Programme to include consistent formats for learning new skills. For example, when developing skills to manage poor performance, change, and customer complaints, they used a six-step framework:

- Verbal explanation of the factor
- Demonstration of a positive model (video or live)
- Preparation by Participants to practise the model
- Skills practise using real examples
- Feedback from peers and Facilitator
- Action planning for application in real life

Participants became familiar with the format for learning, which freed them up to focus on each unique six-step framework.

Using BST, the Business Psychologists incorporated instructions, modelling, rehearsal and feedback.

Drawing on the power of association, practice and reward in shaping behaviour, Participants were helped to associate new information with what they knew and were allowed time for practice and feedback/praise.

Participants were also asked to create their own models and tools, for example by brainstorming a process for problem-solving, to increase personal insight, retention and recall.

To address the client requirement for an externally benchmarked standard to be applied, the Chartered Management Institute (CMI) guidelines were applied. As a result, Participants could achieve a CMI-accredited qualification by completing the Programme. In order to

address a possible loss of motivation, Participants were reminded of the value of the CMI qualification and the prestige associated with it.

In structuring the approach, PMSL applied Kolb's Experiential Learning model, ensuring that Participants had the opportunity for self-discovery and experience, both during training sessions and throughout the 18-month development Programme:

- **Concrete experience:** Participants were actively involved and given the opportunity to actually do something. To create concrete experiences during training, team games, problem-solving, discussion, practical exercises and debates were included. Participants were also required to apply the skills back in the workplace to achieve the CMI-accredited qualification
- **Reflective observation:** During training, Participants had an opportunity to step back from the task and review the experience and objectively analyse the outcomes. To allow reflection, Participants were asked to observe each other and give feedback, discuss observations and complete Learning Logs. Participants were also required to write reflective statements after each training module as part of the CMI-accredited qualification
- **Abstract conceptualisation:** Participants were helped to make sense of experiences by introducing and then reflecting on models/theories and framing these in terms of their existing knowledge. Participants were also required to complete written assignments, drawing on theories and models as part of the CMI-accredited qualification
- **Active experimentation:** Participants were encouraged to think about how they would apply the skills learnt to their real situations and anticipate outcomes, for the purpose of experimentation. Learning was placed in a context that was relevant to them. To allow active experimentation, Participants had time to plan (for skills practice during training and for application of skills when back in the workplace), they were given case studies, and they used role play with real problems. Participants were also required to explain how they planned for and applied skills learnt as part of the CMI-accredited qualification

In these various activities, Deliberate Practice was applied to developing expertise, and Participants extended the skills practice into the workplace after the training, using Action Learning Sets.

Project Execution

Required skills were identified from the company's senior leaders' competency framework.

Working closely with the client, the Business Psychologists designed and delivered the Programme for 22 Participants. Training (15 days in total) was led by PMSL but supported by the Learning and Development Manager with input from different Country Managers. Together, they designed all aspects of the Programme including which assignments would be completed by Participants during each of the three six-month work rotations and how Participants would be supported during the scheduled application of skills and monitoring/evaluation.

By working with key stakeholders at each stage of project execution, the Practitioners ensured buy-in to the evidence-based content and methods used, encouraging a new Learning and Development philosophy for the client.

Programme Outline

There were 22 Participants in the pilot Programme. PMSL delivered a modular Programme to allow opportunity for application of skills and workplace learning, and completion of written assignments between training events. Application of skills was supported by three work placements.

- Module One: five days of training (October Year 1)
 - Pre-course work
 - Module One: Influencing skills
 - Module Two: Personal development as a Manager and Leader
 - Module Three: Dynamic presenting (part 1)
 - Participants start first work placement rotation and work on CMI assignment (over six months)
- Module Two: five days of training (April Year 2)
 - Pre-course work
 - Module Four: Dynamic presenting (part 2)
 - Module Five: Project and program management
 - Module Six: Strategic problem solving
 - Participants start second work placement rotation and work on CMI assignment (over six months)
- Module Three: five days of training (October Year 2)
 - Pre-course work
 - Module Seven: World class customer service
 - Module Eight: Personal image and brand
 - Module Nine: Managing your own career
 - Participants start third work placement rotation and work on CMI assignment (over six months)

Agreeing Quality Measures

The Kirkpatrick Model was selected for use in measuring the effectiveness of the Programme (Kirkpatrick, 1955). Key Performance Indicators (KPIs) were agreed in advance as follows:

- Level One: Reaction
 - To client's satisfaction
- Level Two: Learning
 - To double the number of Participants having 'Good' or 'Excellent' leadership skills (to 72% of the group)
- Level Three: Application of Skills
 - 100% of Participants to apply their learning between training modules
 - 100% of Participants to pass each assignment and to gain the CMI Level 5 Certificate in Management & Leadership

- Level Four: Business Impact
 - Minimum 70% of Participants to be able to immediately apply the skills and provide evidence of increased quality and quantity of work, saved costs and saved time
 - Return on Investment (ROI) of at least 200% in the first year

The client would evaluate Level One using focus groups after each training week. PMSL would undertake evaluation for Levels Two, Three and Four.

Outcome

The Kirkpatrick evaluation showed that the three requirements of the Programme were met and all Key Performance Indicators (KPIs) were exceeded:

- Level One: Reaction
 - At three separate focus groups facilitated by the client, Participants reported they were satisfied with the content and standard of Trainers and that no changes were required
- Level Two: Learning
 - Questionnaires completed by Participants' Managers before the Programme showed 36% of Participants' leadership skills were rated 'Good' or 'Excellent'
 - Questionnaires completed by Participants' Managers after the Programme showed 82% of Participants' leadership skills were rated 'Good' or 'Excellent.' This 228% increase in the number of leadership skills rated 'Good' or 'Excellent' met the requirement for the Programme to enable Participants to develop the skills needed to become the next generation of leaders at JCI
- Level Three: Application of Skills
 - 100% of Participants applied their learning between training modules, measured by written reflective statements and presentations (of evidence) to senior management
 - 100% of Participants passed each assignment (providing written evidence of application of skills) and gained the CMI (QCF) Level 5 Certificate in Management & Leadership which met the requirement for the quality of the Programme to be externally benchmarked and validated by a recognised authority

- Level Four: Business Impact

Evidence of increased quality/quantity of work, and saved costs/time, was measured by evidence logs and a questionnaire. These were verified by Participants' Managers. For example:

- "I prepared a project plan in one week instead of one month. Solved the problems quicker and found solutions because of the techniques learnt. Prepared presentations quicker, came to the point and shared all important information in a unique way"
- "My good presentation skills helped me implement a customer focused initiative which increased the average spend of JCI's largest customer"
- "I improved communications with the customer by introducing a new reporting template during a product development project"

Participants reported that, as a result of attending the Programme, the following business benefits had been realised:

- 93% of Participants reported increased quality of work
- 87% of Participants reported increased work output

- 72% of Participants reported creating cost savings, quantified to c.1.3million Euros (currency relevant to budget holders)
- 87% of Participants reported time savings, quantified to over 200 days
- Level Four: ROI
 - The initial payback period was 3.5 weeks, measured by weighing financial benefits achieved, against the cost of the Programme
 - The first year ROI was 1,896% which exceeded the requirement for the first year ROI to be at least 200%

General Review

JCI needed to ensure a pipeline of world-class leaders to continue to deliver their vision of “a more comfortable, safe and sustainable world.” By mapping the content of the Programme to the leadership competency framework and ensuring that models and techniques used were evidence-based, the Programme successfully developed a group of future leaders.

The Business Psychologists suggest, with some certainty, that the results reported resulted from the development Programme because:

- The Programme involved intensive training, reading, assignments, work-based learning activities, pre- and post-training work and ongoing support from Managers and PMSL
- The Participants did not undertake any other formal leadership development during the 18 months

The next step was to roll out the Programme globally and increase the pipeline of world class leaders.

Lessons Learned

The pilot Programme demonstrated the importance of providing opportunities for Participants to practise and apply the skills learned, and to focus Participants’ attention on recognising their successes.

Future Programmes provided opportunities for Participants to publicise their successes to the wider leadership population, in order to raise their profiles as future leaders at JCI. And further development for Participants, in the form of work opportunities and coaching, was arranged.

After the Programme, 18 out of 22 Participants rated their leadership skills as ‘good’ or ‘excellent.’ This suggested there was potential to further develop/embed some skills.

Acknowledgements

Maggie Mosley, Business Psychologist, PMSL

Suzy Gabbay, Business Psychologist, PMSL

Sarah Phillips, Business Psychologist, PMSL

David Johnson, Business Consultant, PMSL

JCI Talent Development Team