



## Expanded role for Chief Learning/Chief Development Officers:

... *Developing a Leadership Pipeline of Talent to assure the Organization has a competitive edge:*

### Coaching Guide:

**Rationale:** In order to expand into more of a strategic role the Chief Learning Officer or a Chief Development Officer must acquire skills and competencies if one is to be successful with a closer and more significantly involvement at the senior level, particularly in situations such as:

- **Assessing Organization Capabilities** (*can this unit step up as it is critical for an up an up and coming key acquisition?*), and
- **Deployment Decisions involving individuals** (*What does our promotable pool of candidates look like, who do you think is the best candidate for this pivotal position?*)

The key is to have information—useful, discriminating, readily available information that is valuable to bring to the discussions; thus, this is a different framework and skillset. Challenging—yes, daunting—no, these skills can be learned; rewarding and can you make a difference—absolutely!

**At the Profitability Formula we have coached numerous individuals to make this significant jump in their career.**

### The challenges could involve:

- **Your CEO has suggested a two year developmental assignment in this type of position for a 'high potential talent' who *has not been involved* in HR...**but could benefit from heading up this function...we have done this numerous times...know what works—particularly how to quickly get traction;
- **A brand- new challenge for the organization...**'we don't have a succession planning system, but need to develop our talent so that we can be better prepared for the future; or
- **A need to re-vitalize a process that is not producing the results desired...**'something is just not right...we have too many leaders appointed who are struggling, or too many leaders see talent development as 'this is HR's responsibility', or...it could involve
- **A part of your process needs a refresh or re-think...**some common issues
  - Our Assessments done by our individual managers... do not produce 'believable' or useable data ...and, there is too much time involved...***is there a better way—Sure is!***
  - **Involvement and stewardship by the Senior Leadership Team...**is there a way to do this without eating up too much of their time...***Absolutely!***
  - **Our Talent Review Meetings...just do not work that well.** Is there something we can do to improve those meetings? --***the answer-absolutely,*** or?
  - **What are best practices in some leading organizations;** example...What is the Litmus Test that we have developed for someone to 'be promoted'...***simple, but profound!***

## Areas to be covered in Coaching individuals to assume this key role in an Organization

**Professional Goal:** *Demonstrating Competencies to play a larger role in Strategic Deliberations and Execution—making a larger 'difference': ...at the end of the coaching assignment- the individual...*

- Perceived as a solid "sounding board for executives"
- Exhibits strong business and personal trusting relationships built—your perspective is sought and consistently valued;
- Coaches other leaders about a "talent mind-set" ...help shape views/opinions
- Assure consistent approach...reinforce the business benefit/ROI of talent and the pipeline we need for the future;
- Regarded personally as a "solid assessor" of talent; able to succinctly provide a balanced summary of the individual upon request: professionally and lucidly discussing talent
- Provide direction and standards so that management faces up to tough issues;
- Basically, runs the Leadership Pipeline supporting local business unit or corporate level.

**\*At the corporate level there needs to a professional devoted to Leadership and Executive Development. Two essential over-riding deliverables in that role: gets quick traction-**

- **'Get good qualitative talent information'** --Assure that the organization has segmented the talent base...and has valid, reliable, timely, differentiating and useful information...as a starting point;
- **'Provide leadership to assist managers to use that information to drive the strategic agenda-'** Provide an approach and assist executives to be successful in building a pipeline of talent

## How: Chief Learning Officers... 'Gets it Done': Skills/Competencies

Overall critical Skills/Competencies to be demonstrated:

- 1<sup>st</sup>: Personal Assessment Skills
- 2<sup>nd</sup>: Positioning-Planning the System and Orchestration...building impact
- 3<sup>rd</sup>: Deployment of Talent
- 4<sup>th</sup>: Coaches leaders about individuals and the Pipeline of Talent:
- 5<sup>th</sup>: Influences others to Engage/Drive toward having a solid bench...a Leadership Pipeline in the unit
- 6<sup>th</sup>: Moves the Needle Up in Change Capacity

## Skills/Competencies that will need to be demonstrated:

### 1. Personal Assessment Skills:

- **1-a: Personal Assessment/Judge of talent:**
  - Objective/skillful in interviewing and appraising individuals
  - Is a good judge of talent; after reasonable exposure, can articulate the strengths and limitations of people inside or outside the organization
  - Can project how an individual would function in a position of larger responsibility and across a variety of situations
  - Demonstrates ability to see differences in individuals and can project how to manage against and use those differences for everyone's benefit.

### **1-b: Solid Leader in Talent Review Sessions/Process and utilization of information**

- Facilitated sessions with various leadership groups provided (fits with overall timetable)—meeting judged as “superior”
- Talent plan developed for unit; in concert with corporate timetable
- Overall approach with talent communicated “our approach” to leadership in unit served...Business case anchored;
- Data gathered on talent in unit (s)
- Reports prepared –timely turnaround
- Provides summary data on talent in unit to corporate talent development department/ Strategic staffing function

### **2<sup>nd</sup>: Positioning--Planning/Orchestration at Unit Level**

2-A: Assists unit head in preparing for in-depth review of unit—The **Talent Review Action Meeting** with COO and SVP HR; particularly homing in on the (80/20) key issues and “what needs to be done”

- Executive Summary....Key business impact issues;
- Action Plans with timeline

2-B: Attends—is a solid leader in talent review meeting with executive leadership

- a. Actively participates and provides personal perspective
- b. Documents agreed to action, and resource commitments made in Talent Review Meeting...forwards to CHRO;

2-C: Post Meeting: Documents work orders/ “drill-downs” developed... *who* does *what*, by *when* --the detailed plan is distributed, implemented and tracked—can be reported on;

- Demonstrates leadership as a member of the HR talent team corporate wide;

### **3. Deployment: Assignment Management: ... *Right people, ...right place, doing the right things at the right time:***

3-A: Assures that Talent Assessment data— ‘the pools’ are utilized as a first source in staffing decisions, leading to promotion of the best talent

3-B: Orchestrates the staffing process...total process is ‘wired’, comes off as very productive and produces solid outcomes

3-C: Creates lists of candidates from the Talent Pool...follows up –pushes toward talented individuals being promoted into higher level positions;

3-D: Demonstrates ability to quickly identify/surface leaders who are ready to assume larger roles; view is trusted;

3-E: Produces a consistent, professional summary of the business and position need; dossier on candidates considered;

3-F: Provides leadership to assure that a common framework for identifying solid candidates and tracks process and closes the loop with candidates and those seeking candidates.

#### **4: Coaches leaders about individual and Pipeline of Talent:**

- Organization approach used—educate leaders about a common framework for identifying high potential talent, promising female and minority talent, and marginal talent.
- Assist them to:
  - 'Look at the bigger picture'...assuring that our management talent base is a sustainable, competitive advantage and a catalyst to drive change
  - Holds leaders accountable for putting the right people forward promotable/game-changers or superior talent if going external
  - Define business need, requirements for the position, and how to use information with internal candidates;
  - Challenge and strengthen a manager's strategic and general management skills around talent...coach to assure that we go beyond the traditional 'let's send them to a course'
  - Identify issues and action plans concerning the mix of talent against current needs and strategic issues
  - Send strong signals about leadership, developing talent, and promoting diversity'
  - Utilize this unique opportunity to reinforce the meritocracy philosophy and build a common framework on people / performance standards.
  - Step up "take action" category
  - Holds leaders accountable for putting the right people forward promotable/game-changers or superior talent if going external

#### **5. Influences others to Engage/Drive Leadership Pipeline in the unit**

- 5-A—Strong advocate regarding drive to create and feed the Pipeline
  - Send strong signals about leadership, developing talent, and promoting diversity'
  - Utilize this unique opportunity to reinforce the meritocracy philosophy and build a common framework on people / performance standards.
  - Steps up "take action" category
  - Holds leaders accountable for putting the right people forward promotable/game-changers or superior talent if going external
  - Drives On-boarding for new entries into always unit/knows status
- 5-B: Challenge and coach managers:
  - Strengthen manager's strategic and general management skills using jobs, task assignments and coursework
  - To step up to their role of developing people; assist in accessing internal or external resources;
  - Ensure managers in that unit receive solid feedback and have a clear and consistent understanding of how they are viewed and valued;
  - Ensuring that new managers are "On Boarded" ---and that managers are actively engaged in assuring that a new leader is successful;
  - Ensure high potentials know they are valued and have solid development plans in place;
  - Ensure meritocracy—and the strong correlation between pay / recognition and performance/potential; short- and long-term reward/compensation is differentiated for our highest talent;
  - Monitors and directs assignments of high potentials;
  - Champions the development of a diverse mix of leaders.

## **6. Moves the Needle Up in Change Capacity ...helps us to get to the future**

- 6-A: Ensures managers are equipped with tools to be able to attract, select, develop and retain talent that drives change;
- 6-B: Ensure that the reward mechanisms focus on individuals that truly can drive change
- 6-C: Ensures managers proactively communicate change and key messages to impacted individuals.
- 6-D: Build or buy developmental programs to increase leadership change capacity
- 6-E: Equip managers to help their people embrace and flourish in change
- 6-F: Assure that our management talent base is a sustainable, competitive advantage and a catalyst to drive change

Contact us if you feel we could be of assistance to you with this important role.

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