## 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...*

- o Perceived as a solid "sounding board for executives"
- o Exhibits strong business and personal trusting relationships built—your perspective is sought and consistently valued;
- o Coaches other leaders about a "talent mind-set" ...help shape views/opinions
- o Assure consistent approach...reinforce the business benefit/ROI of talent and the pipeline we need for the future;
- o 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
- o Provide direction and standards so that management faces up to tough issues;
- o 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:
- • 1st: Personal Assessment Skills
- • 2nd: Positioning-Planning the System and Orchestration...building impact
- • 3rd: Deployment of Talent
- • 4th: Coaches leaders about individuals and the Pipeline of Talent:
- • 5th: Influences others to Engage/Drive toward having a solid bench...a Leadership Pipeline in the unit
- • 6th: Moves the Needle Up in Change Capacity

## **Skills/Competencies that will need to be demonstrated:**
### **1. Personal Assessment Skills:**
- o **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

### 2nd: 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:
  - o 'Look at the bigger picture'...assuring that our management talent base is a sustainable, competitive advantage and a catalyst to drive change
  - o 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

- o 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
- o 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.

**Charles H. Bishop, Jr., PhD**
**The Profitability Formula, LLC**
**E-Mail: Charlie@theprofitabilityformula.com**
**Phone:        312-267-2924**
**Cell:          847-404-7015**