

Executive Development Program

How to develop the CEO of the next generation

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Technical Project Outline: How to develop the CEO of the next generation

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[A] PREPARATION

Expectation Management

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[D] IMPLEMENTATION

Development Measures

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[B] ANALYSIS

Development Appraisal

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[C] DESIGN

Development Program



Long-term Succession Planning, Development, Networking & Mobility within Senior Management

Baumgartner Approach: Executive Development Program

[A] PREPARATION: Expectation Management

- Step A-1:
Kick-off and Planning Meeting
- Step A-2:
Strategy & Competency Model
Analysis
- Step A-3:
Target Job & Succession Plan
Analysis
- Step A-4:
Methodology &
Communication Workshops
- Step A-5:
Expectation Dialogue Meetings

[B] ANALYSIS: Development Appraisal

- Step B-1:
Process Communication
- Step B-2:
Collect Candidates' Career
Profile & Self-Assessments
- Step B-3:
Conduct Interviews With
Superiors
- Step B-4:
Conduct & Consolidate
Interview With Candidates
- Step B-5:
Draft & Review Development
Appraisal Reports
- Step B-6:
Provide Candidate Feedback

[C] DESIGN: Development Program

- Step C-1:
Identify Potential Development
Topics
- Step C-2:
Draft Initial Program Design
- Step C-3:
Facilitate Program Design
Workshop
- Step C-4:
Specify Program & Confirm
Availability and Dates
- Step C-5:
Provide Final Program Agenda

[D] IMPLEMENTATION: Development Measures

- Step D-1:
Provide Program Briefing
- Step D-2:
Ensure Standard Processes
- Step D-3:
Coordinate Program
- Step D-4:
Coaching Candidates
- Step D-5:
Evaluate Progress
- Step D-6:
Communicate Progress

Preparation: Expectation Management (1/2)

Success Factors and Leading Practices

- Ensure full commitment and support of executive board
- Appropriate time planning considering the involvement of executive board members and candidates
- Clear communication of project objectives, approach, methods and time schedule to selected candidates
- Clear communication to not initially selected candidates
- Align succession planning with corporate strategies
- Clarify and match the candidates' development objectives, mobility and career expectations with the global organization's career opportunities
- Ensure feasibility of executive board members' involvement in assessments and feedback dialogue

CRITICAL DECISIONS TO BE TAKEN

Decision 1: Succession Plan

Are the executive board members committed to the succession plan and to establish a global development and (eventually cross-divisional) mobility program?

Decision 2: Executive Board Involvement

Are the executive board members at group and division level committed to get involved in (a) top-down assessment interviews, (b) candidate feedback dialogues, and (c) development measures?

Decision 3: Candidate Selection

Is there a reliable match of the candidates' development objectives, mobility and career expectations with the global organization's career opportunities? If not, would you offer alternative career challenges or postpone the participation in the initial program?

Decision 4: Overall Project Schedule

What is the optimal timing for each project phase considering the senior executives' business engagements?

Preparation: Expectation Management (2/2)

Deliverables

- Detailed project schedule
- Description of roles and responsibilities
- Description of selected approach and methods
- Approved manuals/guidelines for
 - » expectation dialogue with candidates
 - » executive board member interviews
 - » candidates' online self-assessments
 - » development appraisal interviews with candidates
- Master/sample assessment reports
- Project communication materials

Provided by client:

- Clustered list of candidates and possible target jobs
- Profiles of target jobs
- Relevant strategy papers and competency model(s)

SUGGESTED APPROACH & METHODS

Step A-1: Kick-off and Planning Meeting

Clarify board decisions, project objectives, detailed approach, schedule, roles and responsibilities within project team

Step A-2: Strategy & Competency Model Analysis

Understand the company's strategic initiatives and resulting managerial (competency) requirements within project team

Step A-3: Target Job & Succession Plan Analysis

Understand the relevant organization structure, job assignments and succession plans within project team

Step A-4: Methodology & Communication Workshops

Describe, assess and select appropriate online self-assessments, and draft customized manuals/guidelines for performance evaluation and development appraisal interviews, sample assessment reports and communication materials within the project team

Step A-5: Expectation Dialogue Meetings

Facilitate individual candidate meetings in order to clarify and match the candidates' development objectives, mobility and career expectations with the global organization's career opportunities

Analysis: Development Appraisal (1/2)

Success Factors and Leading Practices

- Transparency: clear communication of development purpose, overall process and nature of results
- Strategy & vision alignment of assessment process; linkage to future competency requirements
- Base the assessment on multiple sources
 - » candidate's career track, business contributions & challenges and career expectations (online)
 - » multi-rater (360°) feedback on leadership and collaboration; at least: top-down performance appraisal (personal interview with superior)
 - » candidate's self-assessments (online)
 - » strategy and business-focused candidate interview with two external consultants
- Joined appraisal feedback and coaching by external consultant and superior

CRITICAL DECISIONS TO BE TAKEN

Decision 1: Appraisal Process & Methodology-Mix

Decide on the proposed process steps and methods/tools, especially on use of multi-rater feedback tools vs. interview with superior; mix of online assessment tools; semi-structured 'strategic readiness interview' guideline)

Decision 2: Appraisal Report Format

Decide on the proposed report formats for candidate feedback, superior and HR (e.g. executive summaries, detailed analyses at individual and portfolio level)

Decision 3: Appraisal Feedback Process

Decide on the process and team for the entire reporting and feedback process (e.g. consolidation of results, review with superior and HR, joined appraisal feedback and coaching by external consultant and superior)

Decision 4: Sequence, Timing & Locations

Decide on the sequence, timing and location for both, the different assessment modules and feedback meetings (e.g. collect candidate's career profile and conduct self-assessments before conducting the performance appraisal interview with superior; conducting candidate interviews and feedback meetings on site)

Analysis: Development Appraisal (2/2)

Deliverables

- Detailed description of process sequence and methodology-mix
- Candidates' individual development appraisal reports, including e.g.
 - » candidate's career track, business contributions & challenges and career expectations
 - » top-down performance appraisal
 - » candidate's self-assessments, e.g. Hogan, MBTI- Step II, FIRO-B
 - » strategic readiness and development appraisal report resulting from interview with two external consultants
- Organizational portfolio report including executive summaries of individual candidate's reports

SUGGESTED APPROACH & METHODS

Step B-1: Process Communication

Complete the initial project information by detailed descriptions of the development appraisal process, methods and tools as well as on the nature of outcome

Step B-2: Collect Candidates' Career Profile & Self-Assessments

Provide various online tools to collect career information and self-assessments, which will serve as optimal preparation for interviews with superiors and candidates

Step B-3: Conduct Interviews With Superiors

Conduct a 1-1.5 hours structured personal interview with the candidates' superior

Step B-4: Conduct & Consolidate Interview With Candidates

2 consultants conduct a 3-4 hours strategic readiness and development appraisal interview (which has been designed in step A-4) with each candidate and consolidate their findings and assessments immediately after each meeting

Step B-5: Draft & Review Development Appraisal Reports

Draft development appraisal reports and review them with superiors and HR

Step B-6: Provide Candidate Feedback

1 consultant and the candidate's superior provide feedback in a 1-1.5 hours meeting

Design: Development Program (1/2)

Success Factors and Leading Practices

- Clearly defined career model, including cross-divisional or functional developments and international mobility
- Clarity of individual career opportunities and expectations
- Opportunities for the group to interact with each other over future issues and build a strong sense of camaraderie
- Content that is action oriented and applicable; challenge candidates in realistic simulations (new media)
- Leadership labs on real life cases, dilemmas and challenges
- Integration of (multi-rater) feedback process/tools and on-line self-assessments
- Effective one-one coaching so that the themes are clearly incorporated into each person's development agenda

CRITICAL DECISIONS TO BE TAKEN

Decision 1: Core Themes

Based on the developmental analysis in phases A and B and based on the corporation's needs for leaders at the top, insure that the themes covered in the program are on target.

Decision 2: Time Line and Formats for Meetings

How many times should the different groups meet in person and for how long each time? Are virtual meetings (e.g. webinars) to be included?

Decision 3: Projects and Topics

Will action projects be included in the program? If so, what format will they take? How much time will each participant be expected to spend on the project? How will topics be selected (e.g. by participants or by sponsors)? What will happen with project outputs?

Decision 4: Face-Face Meeting Locations

Where will meetings take place? Will there be an opportunity to incorporate insights about the global business environment in any of the meeting locations?

Decision 5: Costs

Insure that the design and speaker fees are within cost expectations

Design: Development Program (2/2)

Deliverables

- List of development topics meeting the individual and collective development needs of the different candidate groups
- Initial draft of an approved modular program design that includes innovative elements, e.g. action learning projects, networking, social engagement projects, new media integration
- Samples of suggested action learning projects and online tools
- Final program design and schedule along with suggested faculty, speakers, coaches and facilitators
- Confirmation of availability and fees of faculty, speakers, coaches and facilitators
- Confirmation of dates and schedule

SUGGESTED APPROACH & METHODS

Step C-1: Identify Potential Development Topics

Identify and cluster potential topics based on insights from the individual and collective development analysis of the different candidate groups.

Step C-2: Draft Initial Program Design

Draft an initial program design for each target group, including themes, format, methods, tools, faculties, speakers, coaches, facilitators and board involvement.

Step C-3: Facilitate Program Design Workshop

Facilitate a two-day workshop with HR and any relevant stakeholders to review themes, discuss options, examine potential materials and schedules and finalize a working design. HR to seek necessary approval and support for the design.

Step C-4: Specify Program & Confirm Availability and Dates

Specify the approved program design. Contact key personnel and check availability for target dates. Confirm key personnel and dates. Finalize all personnel and issue contracts.

Step C-5: Provide Final Program Agenda

Provide the final program agenda with program titles and personnel.

Implementation: Development Measures (1/2)

Success Factors and Leading Practices

- Preferred career model (including divisional or functional 'silo development' vs. cross-divisional or cross-functional movements and international mobility) is clearly defined
- Each participant has a clearly identified development agenda and an action plan along with appropriate support for the coming year(s)
- Development agendas and action plans are communicated to superior, HR and any other key stakeholder (e.g. senior sponsor or mentor)
- Participants have a strong sense of camaraderie and stay in touch with each other over the coming year(s)
- Participants feel the time was well spent
- Progress is assessed against each development agenda in one year

CRITICAL DECISIONS TO BE TAKEN

Decision 1: Sharing of Development Agendas and Plans

How will the sharing of key development areas and plans be shared with the appropriate people? Will the process be monitored and if so how?

Decision 2: Evaluating the Success of Programs

Which specific measures are most useful in evaluating the time and expense of scheduled programs?

Decision 3: Progress on Development Agenda

Will progress be assessed in the same manner as the initial developmental assessment? Or will an abbreviated process be used? Same questions or more individually targeted questions?

Decision 4: Communicating Progress

How will progress on the development agenda be communicated to the participant, the superior, HR and any other relevant parties?

Implementation: Development Measures (2/2)

Deliverables

- Program coordination:
 - » ongoing coordination of the different programs, schedules, measures, faculties, speakers, coaches and facilitators
 - » ongoing program administration
 - » ongoing quality assurance and evaluation of individual development measures
 - » ongoing program communication
- Candidate coaching, e.g.
 - » 'general learning coach'
 - » 'action learning project coach'
- Progress evaluation, e.g.
 - » self-assessments (online)
 - » interview with superior
 - » multi-rater (360°) feedback

SUGGESTED APPROACH & METHODS

Step D-1: Provide Program Briefing

Provide a consistent briefing on company's strategic initiatives, development program and individual candidate's needs to all facilitators and vendors involved

Step D-2: Ensure Standard Processes

Insist on standard process for all coaches, facilitators and others doing the same job

Step D-3: Coordinate Program

Provide ongoing program coordination, administration and quality assurance; manage coaches, facilitators or speakers both in terms of content and implications

Step D-4: Coaching Candidates

Offer candidates to get accompanied by a general learning coach or by an action learning project coach

Step D-5: Evaluate Progress

Provide effective process and tools for evaluation of progress on development agenda

Step D-6: Communicate Progress

Prepare communication materials on intermediate and ongoing development progress

Your contacts



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- People Strategies & HR Management
- Integrated Talent & Performance Management
- Career Architecture Design
- Management Audit



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Coaching and consulting focus on the leader's role in

- pushing strategic thinking and execution
- driving change
- developing leadership capability
- managing diversity

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