



Investing in the Right People at the Right Time

By Katherine Ebner

Which strategies work best to motivate and retain your high potential employees? How do you know you are making the right levels of investment in talent development? Which investments are most impactful at each career stage and why?

People need different things at different stages of career and maturity. As a leader thinking about how to invest in your people, you may be tempted to search for one-size-fits-all solutions, but, with attention to the common needs of employees at different stages and greater awareness of which formats and options have proven most effective for each level or career stage, you can create a smart talent development strategy with confidence.

One of the most important jobs you have as talent development leaders is to ensure that your talented people are developing the mindsets and leadership capacities needed to succeed at the next level, not just the skillsets. High caliber leadership development programs demonstrate not only how to build skills, but also provide

the insights and learning methods that stimulate new ways of thinking and seeing the world. As designers and facilitators of such programs, we find the inevitable requirement to define the “take-aways” to be a helpful discipline, though sometimes limiting approach. We spend the majority of our preparation time working through the flow of concepts, the exercises, the pre-work and post-event assignments that will move the participant from a traditional classroom mentality to that of a deeply curious and engaged lifelong learner.

This article provides a useful framework for assessing in whom to invest and which development options will be most valuable for the leader or leaders you have in mind.

Nebo Design Framework

Participants	Objectives	Budget	Format	Content	Timing	Feedback
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Participants

First, step back and assess the needs of the organization. Do you have many new managers and a great deal riding on their ability to get things done? Have you recently undergone a reduction in the work force and need to support the group of talented leaders who remain by investing in them as they navigate and grow through leading change? Are you looking to help the executive team work more effectively together? Or perhaps you want to retain a particularly talented leader whose personal style is challenging for others?

These are just a few of the many scenarios we see that are worthy of an investment in leadership. As you take stock of your own organization's needs, remember that the context of the organization creates the imperative for investment. Your first job is to determine who will participate, but that question is closely tied to organizational strategy and priorities.

Questions to Consider:

Where will our investment make the biggest difference for the business? Who should be included? What are the criteria for being selected to participate? Whose approval is needed? Is the individual/group/team ready?

Objectives

Define the objectives that you would like to achieve as a result of your investment. We recommend exploring the 'ABC's' as described below as a way of getting clear about your goals. Taught to students at Georgetown's Institute for Transformational Leadership by instructor Rae Ringel, this simple method can help you define success so that others can then develop the experience effectively for you.

- **Affective:** What do you want people to feel/experience?
- **Behavioral:** What behavior change or new skill would you like participants to be able to do?
- **Cognitive:** What do you want participants to learn and know?

At Nebo, we add a fourth category:

- **Transformative:** What is the shift in perspective that you are looking for in these leaders?

We recommend that you share the objectives with key stakeholders and those who will send people to your program so that they can help influence the framing and content of the program.

Here are examples of objectives that we often hear:

Objectives

- Reach the most people
- Reach across geographies
- Build engagement and commitment of employees
- Get information out quickly
- Prepare rising managers
- Prepare rising leaders
- Develop leadership team
- Develop senior leaders and executives
- Retain key talent
- Provide useful know-how to employees
- Offer leadership development and build community of peers

Questions to Consider:

What are the business (organizational) objectives for making this investment? What are the objectives of the program itself? How resonant are these objectives with key stakeholders – participants and sponsors?

Budget

Budgets provide the resources to invest in coaching, leadership programs and attendance at learning events, such as conferences. According to *Training Magazine's "2017 Training Industry Report,"* although most budgets for learning and development stayed flat, where there were increases companies spent most on:

- Increasing the scope of their training programs, with focus on management/supervisory training
- Adding training staff
- Increasing the number of learners in their programs
- Purchasing new technologies

On average, organizations plan to allocate the most funding to the following categories, in order of investment level: professional/industry-specific training; management/ supervisor training; mandatory compliance training; executive development; and on boarding.

What if you are building a budget and don't yet have an established learning and development budget? Here are some typical fee levels to help you estimate what you might need.

Element	Average Cost* <i>*all figures are ballpark</i>	Includes
Training	Varies widely, depending on training	In-person training programs
Stretch Assignments	Varies widely, depending on assignment	Preparation, expenses such as travel, project costs and materials
Mentoring Program	\$8,000 - \$20,000/yr	Training for mentors and mentees; mentor matching; networking & learning workshops; troubleshooting, evaluation
Sponsorship Program	\$40,000/yr	Training for sponsors and protégés; networking & learning workshops; check-ins; evaluation
Individual Leadership Coaching	Varies widely, but low cost is not always best value \$10,000/8 sessions	Coach-matching; 8 coaching sessions; Leadership 360; Stakeholder Feedback (5 interviews); On-going support
Executive Coaching	Varies widely, different models; highest cost is not always best value \$15,000/six month contract - \$120,000/yr or more	Variable – from “regular twice-a-month” coaching to retainer model coaching to special intensives, i.e. leadership vision retreat + coaching. Should always include a feedback element. Regardless of approach taken, more time intensive, complex and challenging
Group Coaching	\$2,000 – 5,000/session, typically with 8-10 leaders	Variable – from “regular twice a month” coaching to retainer model coaching to special intensives, i.e. leadership vision retreat + coaching. Should always include a feedback element. Regardless of approach taken, more time intensive, complex and challenging
Team Coaching	Variable Often a retainer or an engagement contract for 4-12 sessions \$20,000 – \$200,000, depending on what is included	Working with intact leadership team over time, usually from six months to a year or more; may include facilitation of retreats, attendance at team meetings and strategy sessions, one-on-one interviews or coaching, 360 for team, etc.
Conferences & Seminars	\$1,075/learner (2017), up from \$814 in 2016	Larger companies benefit from economies of scale and spend less than \$399/learner. Midsize companies spend \$941 and small companies spend \$1886
Classes/ Courses/ Workshops	Varies \$5,000/half day class	½ day workshop taught by expert instructor to group of 20-30; costs may be affected by topic, caliber of instruction, size of group
Cohort-style Programs	\$60,000- \$80,000, depending on # of participants and sessions	6 ½ day sessions over a six-month period, plus coaching for participants; 1 assessment
Web-based	Varies widely	Online delivery, may include delivery platform, instruction, pre and post-work, virtual “cohort”, video, discussion groups

Questions to Consider:

What is the budget for this priority? Does the budget afford what we need? If not, are there “creative economies” to be found? How can we protect quality while managing costs? How can I engage my learning and development providers in a conversation about priorities, budget and options?

Format

When it comes to investing in your people, you have many options. The table below provides a list of formats that can work for a wide range of objectives. It is worth noting that the format you choose should be a match for both the learning needs of your leaders and the content that is being taught. For example, a senior leader transitioning into a new role will benefit enormously from the focus and privacy of leadership coaching, while a group of managers who are learning how to give meaningful feedback and clear direction will prefer an interactive in-person format where they can build a peer network while practicing the skills.

Format Options

- Training
- Stretch Assignments
- Mentoring
- Sponsorship
- Individual Leadership Coaching
- Executive Coaching
- Group (Peer) Coaching
- Team Coaching
- Conferences & Seminars
- Classes/Courses/Workshops
- Cohort-style Programs
- Web-based

Questions to Consider:

Which format best suits the needs of the participant(s), objectives, budget? What will be the process of delivering the experience? Shall we do separate programming for leaders in remote offices or can we bring them to the location for an in-person experience?

Content

Over the years, we first expanded and then streamlined our curriculum of leadership programs. In the early years, we saw that groups wanted to go deeper and spend more time on “micro-topics,” or sub-topics within a larger concept. As time passed, however, we decided to focus our work on the essential topics for people at each level of a career. We refined our offerings to directly address the common, yet often very challenging development needs that, when met, make the most difference for the organization and the sustained success of its managers and leaders. We work closely with our clients to contextualize that material so that it is relevant and appropriate for their needs.

Additionally, we see that the same topics, such as “leadership communication” can, and must, be taught at every level, though the methods and content may vary to meet the needs and developmental stage of participants. Today, we design and develop content with adult stage development theory in mind, understanding that most of the workforce operates from the adult maturity stages of “expert” and “achiever” – meaning that most managers and rising leaders will be looking for knowledge, tips and tools as the definition of value from a session.

Executive leaders (C-suite) and senior leaders, on the other hand, often feel the discomfort of having to solve seemingly intractable problems, which pushes them to the edge of their comfort zone and often catalyzes “vertical growth.” In other words, in order to succeed while leading an organization through significant change or innovation, the leader, by necessity, must herself change in order to demonstrate the capacities needed for higher level leadership. For senior leaders, therefore, leadership development must provide more support, deeper exploration and reflection, and relevant concepts that help make sense of navigating complexity. While they still benefit from the skills-focused work of learning to give feedback, for example, they also must grasp how their mastery of communication is affecting the results they are getting. While they still may be keen to learn how to build a vital network, understanding how to use that network to move decisions forward in the organizational system is most valuable.

Once guided by a clearly stated set of learning objectives, we can move forward to choose the content that will be right for the needs of the individual, group or team. The choice of content requires us to look at the context of the organization or the leader. We must identify the knowledge that is most relevant and needed, the skills that are required for success, and the perceptual (transformative) shift that is desired as a result of the learning.

Questions to Consider:

Which concepts are essential for this group to grasp and use at this time? What skills or new behaviors do we want to see? Describe the desired mindset. How does the content connect with the organization's context? How well are your instructors making these explicit connections?

Timing

While timing is seemingly the most minor element of our design framework, we find it is often the stumbling block for moving forward with an investment in talent. Many talent development leaders find themselves grappling with the company calendar to figure out when employees will have time to participate or going back and forth with sponsors to fine-tune the concepts. Leaders who say they are more than ready to get started with coaching in October soon tell their HR liaison that it must wait until the close of the fourth quarter. Summertime disrupts all work schedules, making July and early August the lightest leadership development months of the year, in our experience.

Frequently, leadership programs are designed and developed in summer and early fall for launch in the mid-fall or early winter. Programs are likely to take place anytime between October and June, with the exception of educational institutions who often plan faculty and staff development for mid-August. With this in mind, one can anticipate how to build planning and budgeting for key leadership programs into the calendar and allow for enough time to work through the details with the leadership services provider. We recommend allocating at least 12-weeks prior to the start of a program for planning time so that you can work through who will participate, how they will be selected and other considerations.

People seek coaching year-round. The coach matching can take a few weeks to accomplish, so it is likely that the coach and client will be kicking off their work together three to six weeks from the time that you contact the coach or leadership services firm.

When is someone ready for coaching?

We recommend coaching for people who are senior managers or above – certainly for directors, vice presidents and executives. A leader who is a great candidate for leadership coaching meets the following minimum criteria:

- Valued by the organization
- Open to learning and growth
- Able to be self-reflective
- Willing to experiment with new behaviors and ideas
- Has enough time and capacity to add coaching
- Can identify what he or she would like to learn, master or improve
- Has the support of their supervisor

At Nebo, we interview leaders before matching with coaches, not only to get to know them better for the sake of the match, but also to talk about how coaching works, how to make the most of the opportunity, and establish the expectation that the leader, not the coach will drive the process.

Questions to Consider:

For Leadership Programs:

Are there any organizational considerations that affect timing for this offering, such as the annual Board meeting or an urgent project with a near-term deadline? What is the best timing for this leader or group, given the cycle of their responsibilities? What is the best time of day or day of week for this to happen? What frequency and duration will be most effective and also realistic?

For Coaching:

Is this leader/leadership team interested in experiencing coaching? Can they make time for it? Does the leader see this as an opportunity? Does he have the support of a sponsor or supervisor? What can the sponsor do to introduce coaching and support a successful engagement? How would we like to participate in the coaching engagement? (feedback interview, hands off, touchpoint at the end, etc.)

Feedback

As designers and facilitators of learning events, we seek feedback every step of the way – before we start, while we’re working and after we’ve concluded. As leadership coaches, we ask for feedback throughout an engagement. We provide feedback for our clients with 360s and stakeholder interviews. Feedback is essential to excellence.

The Nebo Company conducts feedback evaluations at the end of every engagement. If you are our recurring client, we like to gather the feedback, as well as our own insights and feedback, to have periodic strategy sessions with our clients about what people seem to need, what might work better with a group or how coaching can be utilized better across the organization. For us, the feedback aspect is our commitment to learning with you. Feedback is vital to great work – and tough feedback can be most helpful of all. Don’t be afraid to give feedback to your leadership services providers and also to ask them for feedback and insights. The partnership approach yields extraordinary results.

Questions to Consider:

What did we learn about this individual/group as a result of this investment? Did the facilitator/coach deliver valuable services? Did participants gain the intended benefits? Were key stakeholders or sponsors well-informed along the way? What difference do you see as a result of the investment? Were you pleased with the quality of the instruction, content and service level of the provider?



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Rules of Thumb

Using the Nebo Design Framework to work through the questions in each category, you can develop an excellent leadership development strategy with confidence in your choices of format, content and timing. The Framework, while comprehensive, ensures that you take into account the important considerations that lead to relevant, timely solutions that match the career stage and developmental stages of your leaders.

In closing, we offer some guiding ideas that can serve as “rules of thumb” for your work in this area.

- Select your best and most committed people through a transparent process that creates desire to be part of it
- Choose the option that hits the sweet spot between objectives, audience, budget and format
- Pay fairly to achieve your objectives and expect a lot (delete exclamation mark)
- Treat your leadership development providers as partners and build impact together over time by sharing your challenges and concerns upfront and providing feedback throughout.

