

Tero[®] International, Inc.

Leadership White Paper

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Context:

“As any golfer will tell you, the surest way to test a swing is to put it under pressure. And so it is with leadership. The turbulent times that lay ahead will present America’s leadership corps its toughest test witnessed for nearly a decade. Younger leaders, those who’ve taken the helm in the past 10 years, will have to solve problems that they’ve perhaps seldom, if ever encountered. How they respond will, in no small measure, depend on the quality of their developmental experience.”¹

It would be impossible to write about Tero’s leadership development programs without saying a word about the context in which they developed.

At the time of this writing, people in homes and places of worship around the world are praying for wisdom for the leaders of their respective companies and countries. Our own country has recently gone through the downward spiral of an over-valued stock market; the controversial election of its president; the senseless loss of life on September 11th and the subsequent military entrance into Afghanistan and Iraq. Now, in the aftermath of relative calm, many of us are left wondering what to do next; how to move on; how to rebuild.

Never more than now has leadership seemed so important.

The development of the leadership program discussed in this white paper began long before the burst of the dot.com bubble, before hanging chads and before terrorists boarded four flights intent on ending lives. By the time those events took place, the program had been researched, piloted, and was well underway in three successful companies. In fact, a training session on the topic of leadership was scheduled to occur on that too perfect September day. However, instead of facilitating training, Tero trainers—like most world citizens—hunched around the TV in gasps of horror and made frantic calls to locate loved ones.

Since then, we’ve watched as a nation turned to its president for comfort and direction. We cried as an uncharacteristically united Congress stood and sang the anthem with one voice. We watched as the nation declared one “war on terror;” waited as it struggles to bring stability back to Iraq; and hoped for the economy to show signs of improvement.

As these geopolitical and economic events unfolded, we read about leaders in the corporate arena; indicted for scamming their shareholders and employees out of millions.

We listened as these same leaders insisted that they get the performance bonuses they had coming to them. We've also watched as leaders were the first to take pay cuts when their companies struggled in a struggling economy. And we felt proud when an Iowa seed company made the national news for awarding its employees a one-time Christmas bonus of \$1,000 for each year of employment.

It might seem that against this backdrop of leadership gone awry and leadership done well, Tero would have plenty of fodder for research on the great new leaders of the early 21st century.

But leadership isn't really about all that—or at least not to Tero. Even before the events of September the 11th, Enron, or WorldCom, Tero held loosely to the notion of the larger than life Leader with a capital "L." The age of unmitigated belief in the charismatic figure who would fix the world seemed to have come and gone as too many of us realized that they were just too human. Tero was and continues to be inspired by the notion of developing leaders because Tero believes in the leaders with a lower-case "l." These are the people who practice leadership wherever they are. They may not be in positions of great authority or prestige, but they challenge the status quo, motivate and empower others and make the world around them a better place by courageously communicating a clear vision for productive change in whichever situation they find themselves. Before September 11th, Tero was calling these kinds of people "everyday leaders." Now we know them by names like the NYFD, and the crew and passengers of United flight 93. It is in these kinds of leaders that Tero believes and trains—with all its heart.

But it wasn't always like that; in the beginning, the research behind Tero's program began—as most good research begins—with questions.

1. Introduction

Why leadership development?

Tero is in the business of training professionals to understand and use skills that will enhance their personal and professional lives. There are technical skills (writing, typing, accounting, etc.) that can enhance one's personal and professional life, but Tero has always focused on the "soft" skills.

Since 1993, Tero has dedicated itself to understanding the abstract personal and interpersonal skills necessary for success in the workplace. Tero invests hundreds of hours in research, program design and curriculum development to translate the abundant and complex findings of research scientists into relevant, practical and fun training programs that make a real difference to the bottom line for its clients.

Are the soft skills important? Norman Cousins, former *Saturday Review of Literature* editor and UCLA Professor said it this way:

The words "hard" and "soft" are generally used by medical students to describe the contrasting nature of courses. Courses like biochemistry, physics, pharmacology, anatomy, and pathology are anointed with the benediction of "hard," whereas subjects like medical ethics, philosophy, history, and patient-physician relationships tend to labor under the far less auspicious label "soft" . . . [But] a decade or two after graduation there tends to be an inversion. That which was supposed to be hard turns out to be soft, and vice versa. The knowledge base of medicine is constantly changing But the soft subjects – especially those that have to do with intangibles – turn out to be of enduring value.²

These observations from the medical world offer great insight for professionals in government and industry everywhere – and perhaps for none more than those who lead. Where new discoveries and changes in nearly every profession necessitate the constant learning and re-learning of technical knowledge, most people would agree with Cousins about the enduring value of the intangible soft skills. Interestingly, it is often those same people who struggle to define these skills, precisely because they seem intangible. Because of their complex and intangible nature, the training and development of personal and interpersonal skills is largely overlooked in traditional education leaving leaders (in fact, most people) to pick them up on an ad hoc basis. For many, their training in the soft skills is less than effective because it is received from parents, teachers, coaches, peers and managers who themselves, albeit well-intentioned, have been taught ineffective methods of relating. For everyone who has wrestled with how to deliver bad news to an employee, handle an emotional conflict, motivate a team, calm their own anger, inspire others toward a vision or persuade an audience to a course of action, it is vividly clear on a deep personal level how *hard* the *soft* interpersonal skills can be to master. Helping people make tangible, define, develop and *effectively* use the soft skills that provide enduring value is Tero's mission.

Psychologist and researcher Daniel Goleman coined the phrase “emotional intelligence” to refer to the possession and use of soft skills. His research revealed that although soft skills are harder to teach and harder to learn than technical skills, they contribute more to an employee’s ultimate success or failure than do technical skills or raw brainpower.³ Goleman’s research is supported by research conducted by Harvard University, the Carnegie Foundation and the Stanford Research Institute which has shown that technical skills and knowledge account for about 15 percent of the reason an individual gets a job, keeps the job and advances in that job. The remaining 85 percent of job success is based on the individual’s “people skills.”⁴ Similarly, in his book entitled *People Skills*, author Robert Bolton reports that 80 percent of the people who fail at work, do not fail due to their lack of technical skills but rather because of their inability to relate well with others.⁵ Breakthrough research like this led Tero to question: Is having a group of people fully versed in the finer points of soft skills enough to guarantee success in business? Which combination of soft skills will carry individuals and the companies for which they work into future success?

At the time when Tero began asking itself these questions, the shelves of bookstores had already begun to sag under the weight of books on leadership. The business environment had continued to orient itself toward intangibles (like service and intellectual capital) and the age of the personal computer and internet had begun to dawn for the masses. It seemed that change itself was changing at a faster and faster rate. Businesses began to look for leaders to comfort and guide them through change. “Management” as a function became vilified as pertaining only to those small-minded, number crunching control freaks who weren’t hip to the changing times. Even leadership mavens like Warren Bennis and Harvard’s Abraham Zaleznick described managers as people who “do things right” compared to leaders who “do the right things.”^{6 & 7}

The extreme swing away from management and toward leadership was unfortunate because it denigrated the valuable role a manager can and must play within an organization. However, it was a timely shift because while good management is vital for the maintenance of an established system, leadership is required in the face of change. In fact, when leadership researchers James Kouzes and Barry Posner asked recognized leaders to describe their personal best leadership experiences, almost everyone spoke of a change of some kind.⁸ Or, as Harvard’s John Kotter described it; “leadership is the process that produces movement in the long-term best interest of the group.”⁹

The world has continued to change and businesses will move with it or die. For Tero, the direction was clear: we had to create a program that would develop within people the soft skills necessary for the process of inspiring others to commit to movement toward change.

What is the Best Way to Develop Leaders?

Given the need for leadership, it’s only logical to question how best to develop leaders. This is not a new question. Nor is it a question that has been answered or implemented

satisfactorily by many organizations. In 1977, in his article *Managers and Leaders: Are They Different?* Abraham Zaleznik explains one of the challenges of leadership development. He argues that, while businesses must find a way to develop leaders, corporate culture, because of its conservatism and risk-adverse nature (particularly in large organizations), actually stifles leadership development. He goes on further to say “There are no known ways to train great leaders.”¹⁰ More than two and a half decades later, the question about the best way to develop leaders remains. In his book, *The Leadership Factor*, John Kotter reported that the Opinion Research Corporation conducted a study which revealed the severity of the leadership deficit. In the 1970s, 69% of executives surveyed rated their organizations as “good” or “very good” at attracting, developing and maintaining potential leaders. By the early 1980s, that percentage had fallen to 47%. In 1984, not one of the 250 firms surveyed received “excellent” ratings. Less than 7% were rated “very good” and 93% received a lower rating.¹¹

Recent studies on perceptions of the efficacy of leadership development seem to indicate that development efforts have improved slightly, but are still not where they should be. In September 2002, *Training Magazine* and the Center for Creative Leadership published the results of a joint survey of 225 respondents. When asked to rank their company’s use of “...many different development activities (e.g. job assignments, coaches and mentors, training programs, experiences outside of work) utilized to help people develop their leadership competencies,” the average score was 2.89 on a 5-point scale (in which “5” is “strongly agree.”)¹¹

It would seem that the passage of time has only added to the ardor and confusion over quality leadership development. In the fall of 2002, a casual Google query for “Leadership Training” yielded 245,000 web sites. Among the top ten were the following helpful and hopeful possibilities:

- Buford P. Fuddwhacker’s Consulting
- Outdoor Leadership Adventures
- Small Business Development in Namibia
- SALT: “Claiming the North, Preaching the Word, Reaching the Lost”
- Seminars in Leadership, Teamwork and Problem-solving with Foam Swords

The number of books on the subject of leadership has continued to proliferate as well. On the one-year anniversary of September 11th 2001—a day when people continued to seek leadership to guide them through the ongoing confusion—there were 683 books on leadership listed on Amazon.com. Now you can learn lessons of leadership from almost any CEO of a big company, Jesus Christ, Queen Elizabeth I, Abraham Lincoln, Ulysses S. Grant, and the Wizard of Oz. Or, you can attempt to overcome *The 5 Temptations of a CEO*, and master *The 12 Qualities that Make You a Leader*, as well as *The 108 Skills of Natural Born Leaders*. While you’re doing that, you really should learn *The 15 Secrets of Leadership Effectiveness Based on John Wooden’s Pyramid of Success* and take care not to break *The 21 Irrefutable Laws of Leadership* or *The 17 Indispensable Laws of Teamwork*. If all else fails, you can glean *The Leadership Secrets of Atila the Hun* or discover how things turn out when *The One Minute Manager Meets the Monkey*.

Is it any wonder there is such confusion over the subject of the best way to develop leadership? The pursuit of the answer to the question “What is the best way to develop leaders?” is what drove the creation Tero’s Leadership Development Program—or “Boot Camp,” as the Tero staff refers to it due to its intensive nature. It is that question which will set the stage for this white paper.

The rest of this paper will describe the following:

2. Tero’s Training Philosophy
3. The Path of the Leadership Development Program
4. Overview of Course Content and Examples of Learning
5. How Clients Used the Program
6. Research from First Generation Boot Camps (2001-2002)
7. Research from Second Generation Boot Camps (2002/2003)
8. Comparison of Tero Leadership Program Delivery to that of Other Program Delivery Methods
9. Lessons Learned and Potential Areas for Growth
10. Conclusions

2. Tero's Training Philosophy

Principles Underlying All Tero Workshops

The best way to understand Tero's leadership program is to gain an understanding of how Tero approaches all training challenges.

Almost always, the approach is heavily influenced by Tero's flagship program—a two-day presentation skills program called IMPACT® - How to Speak Your Way to Success. This program was designed and launched after hundreds of hours of research and has become Tero's most popular program numbering thousands of graduates from countries across the globe.

Two of the basic tenets of the IMPACT® workshop form the basis of all of Tero's programs: delivery is everything and learning is only half the battle.

First: Delivery is everything.

There are a lot of wrong ways to do training. To reach people, the trainer must take into account and overcome things like...

- The different learning styles represented by any given group of people,
- Their different personality preferences,
- Learner readiness (were they forced to come to training?),
- Varying levels of experience with the company,
- Corporate politics,
- Diversity of life experience,
- Possible learning disorders,
- The time of day,
- Room set-up and lighting,
- The season of the year, etc.

With all of the above things to consider, it is very difficult to say anything conclusive about the *one right way* to train people every time. However, at Tero, there are some basic guidelines that under-gird every proprietary program. Most of the guidelines are based on cutting edge research about how the brain receives and processes information. And, most of the guidelines are flexible enough to accommodate differences among the participants.

Brain-based learning expert Eric Jensen explains that the brain is always paying attention. The question is: To what is it paying attention during training sessions? The goal of Tero's training programs is to harness that attention and focus it on the learning objective at hand. Tero trainers accomplish this by providing a lot of variety in format, activities and topics. As Jensen suggests, "If you want attention, provide a strong contrast from what you were just doing."¹² Strong contrasts can come in the form of differences in

volume, cadence, movement, color or location. Simply doing something adults *didn't expect* you to do is often enough to gain their full attention.

Perhaps the best way to gain a participant's attention, however, is to make them get involved—kinesthetic learning. Whether it's getting up and moving around, taking their own notes, working together in groups, or actually physically practicing the skills being taught, all Tero programs depend heavily on learner involvement. Getting people involved in the learning not only ensures that it is *their* brain that is doing the work of learning (and not just the facilitators'), it provides enough variety to appeal to the diversity of learning and personality styles in any given room.

Another good reason for depending heavily on kinesthetic learning is that brain researchers have found that learning is not a merely cerebral activity. In fact, the best learning occurs when the brain is able to build an entire network of connecting neurons to the new knowledge or skill. To do this, the material must be presented in a variety of formats and accessible with a variety of cues practiced with meaningful repetition.¹³ This helps the brain build many different associations to the same piece of information. Just as knowing several routes to work will allow you to most effectively reach your job; a participant learns something best, when he/she has practiced several different ways of accessing that piece of knowledge or habit of mind. For this reason, Tero workshops always utilize different forms of actively practicing the subject matter.

Another standard Tero practice is frequent breaks. Brain researchers have found that the brain operates on 90-110 minute cycles of attention. Trying to gain someone's attention at the bottom of that cycle is not only difficult, it may be counterproductive. Researchers Rossi and Nimmons found that taking breaks several times a day actually increases productivity.¹⁴ Moreover, breaks allow time for assimilation and processing.¹²

Tero believes that effective training design is only part of the solution. Great content and design in the hands of a poor trainer does not produce desired results. Certified Tero facilitators lead Tero's state-of-the-art training programs. In order to be eligible for certification, Tero facilitators must themselves undergo hundreds of hours of training and development to become experts in learning and skilled in the nuances of effective presentation and facilitation skills.

Individuals who have been invited to participate in Tero's facilitator certification programs already poses a number of unique skills and talents that Tero believes will contribute to success in working with individuals who are building important personal and interpersonal skills. However, potential Tero trainers are told that certification is not automatic nor guaranteed. Fewer than 20 percent of the individuals who are invited to begin Tero's facilitator certification program are awarded certification. Among other things certified Tero trainers must adopt the Tero mission and values as their own.

Tero International Inc.'s Mission

- To show people how to successfully unleash their potential by learning and applying complex personal and interpersonal skills concepts into their everyday lives. We do this by offering the very best skill development programs available.
- To provide members of the Tero team with unparalleled opportunities for career achievement and personal growth.
- To achieve total client satisfaction by focusing on innovation, quality, and customized one-to-one individual service.

Tero International Inc.'s Values

- Integrity, fairness and the Golden Rule guide every business decision.
- The highest professional standards of honesty, ethical standards and responsibility are promoted in all aspects of the business.
- All people are valued and respected for their diversity, their individual learning styles and their preferred approaches to work.
- Quality and innovation in our products and services is of critical importance.
- A positive attitude provides the necessary inspiration to achieve our ambitious goals.

In addition to the adherence to and practice of the above mission and values, certified Tero facilitators must demonstrate proficiency in the following competency areas and certification must be renewed annually at a mandatory Tero facilitator retreat.

- **Program Content/Knowledge:** Facilitators must obviously have complete familiarity with the concepts explored during the program as well as the research on which the concepts are based. Additionally, Tero facilitators must be able to competently model the skills explored during the workshop. This competency is program-specific to each workshop.
- **Presentation Skills:** In all classes facilitators must competently model the Tero IMPACT[®] presentation skills.
- **Creating A Safe Environment:** Tero trainers learn how to create an open, comfortable, safe, non-threatening environment for learning and use a variety of facilitation methods to meet learning objectives.
- **Questioning Techniques:** Tero facilitators are taught to use questioning techniques to get information, check for understanding and involve participants.
- **Managing Group Dynamics:** Tero trainers must also be skilled at the art of getting group involvement, identifying and managing concern or confusion, bringing issues

to closure, respecting everyone's feelings and ideas, and being flexible and responsive.

- **Feedback Skills:** As part of group dynamics management, Tero facilitators should demonstrate effective feedback skills by describing specific behavior (both positive and negative) and suggesting alternative positive behavior.
- **Planning and Organizing:** All Tero classes are choreographed to feel flexible and fluid to participants while at the same time being very structured. This means Tero facilitators must plan ahead, finish early, coordinate materials, visuals and equipment and manage workshop logistics.
- **Creativity in Meeting Learning Objectives:** As part of the art of managing group dynamics, Tero facilitators are encouraged to look for and seize upon unexpected learning opportunities when they present themselves. This often requires that the facilitator show initiative and use innovative and creative approaches to learning while meeting the learning objectives. Sometimes it even means doing real-time program customization to meet the specific needs of the group.
- **Interpersonal Skills:** Certified Tero trainers must also demonstrate effective interpersonal skills by looking for opportunities to enhance the self-esteem of participants, using effective listening skills, negotiating win-win solutions to conflict, seeking to understand the unique needs of individuals and encouraging participant involvement.

Second: Learning is only half the battle.

Good delivery is vital, but not enough. Many trainers are delighted if their audience walks away “having learned one good idea.” As participants of Tero's IMPACT[®] workshop come to understand about their own presentations; learning cannot be the final goal. Simply *knowing* the information is not enough to compel someone to *act* on the information. If it were, the world would be a vastly different place. How many of us *have learned* something about the importance of exercise, a proper diet, and sufficient sleep, yet fail to implement what we know? Learning is important, but must be followed by a persuasive and compelling call to action. This is especially true in a training context. So how do you persuade someone to act?

In his book *Rhetoric*, Aristotle described the three things required to persuade another person to act. One must appeal to *logos* (Greek word meaning “logic”), appeal to *pathos* (Greek word meaning “emotions”), and appeal to *ethos* (Greek word meaning “disposition” or “character”). In other words, if I'm trying to persuade you to act, it has to make sense to you; you have to feel good about it; and you have to trust the person with whom you're interacting. The leadership program has three built-in mechanisms that access all three of Aristotle's points of persuasion.

1. Participants develop a strong support system within the organization.

2. They are given and choose responsibilities so they feel accountable for their own results.
3. Class sizes are kept small so that participants can develop relationships with one another and the Tero trainers.

Over time and with practice, Tero has learned that of all the persuasive forces in place, the relationships are the most compelling.

Tero's Assumptions and Beliefs about Training

Tero programs are all designed with an eye for the delivery and persuasion elements described above. Delivery and persuasion are only appropriate, however, if training is being done for the right reasons and integrated into the client company culture. Even though most people claim to know the word “training” and use it in everyday contexts, Tero trainers know that it means vastly different things to different people.

Therefore with the goal of establishing clear understanding of what Tero means when it uses the word, Tero trainers begin every leadership program sales call with an explanation of its assumptions and beliefs about training. Wrapped up together, these assumptions and beliefs form the basis of Tero's training philosophy. The intent is to lay the foundation of expectation for the potential client with regard to what Tero believes about training.

Tero's assumptions and beliefs about corporate training are the following:

- Training must be engaging, transferable and aligned with the company's strategic goals.
- Training is not always the solution.
- Trainers go home.
- Learning takes time.
- Skill-building requires support and reinforcement.
- Skill-building requires dedicated attention.

Training Must Be Engaging, Transferable AND Aligned with the Company's Strategic Goals

Training should be engaging. Fortunately, there is a veritable multitude of engaging leadership development options. In order to learn leadership you can choose among options like camping in the wilderness, engaging in desert or Native American retreats, or

white water rafting. Or, you can get your entire team stuck on a giant log with an impossible task while certified safety instructors stand by to make sure your harnesses don't come unfastened.

There is no question that exercises like this are engaging. Participants also often report that they had fun and that social boundaries were broken down in the process. However, the real question is whether the exercises are also transferable to the real world in general and to the company's strategic plan in specific. Or, if they are just as Tero team members often say, best at showing the team "to whom to turn for help next time you are stuck on a giant log together."

As previously discussed, Tero workshops are highly kinesthetic. However, the difference between mere activity and a good training exercise is the extent to which it reinforces or teaches the intended concept or skill. There's no question that it is difficult to design a learning activity that is engaging and relevant. However, if it is just engaging, it's no more than entertainment—which is fine—but it isn't training. The sign of a bad training activity according to Tero trainers is having to say: "The point of this exercise was _____."

The Tero philosophy is that the point of the exercise should be obvious and enlightening or it's not worth the time.

Another critically important aspect of designing engaging and transferable training is the learning environment. This isn't easy. In the late 1980s, researchers Timothy Baldwin and J. Kevin Ford found that only 10% of the skills taught in company training programs transferred to day-to-day practice on the job.¹⁵ Sadly, no one really knows if this low rate of return has improved or worsened because research on training transferability is seldom measured. An American Society for Training and Development (ASTD) survey in 1996 found that only 13% of companies surveyed evaluated training in terms of on-the-job performance.¹⁶ The 2002 ASTD State of the Industry Review indicated that the number of companies evaluating on-the-job impact of training had gone up to 21%.¹⁷

Tero tries to overcome those odds by creating a training environment that mimics the environment of the real world while still providing a safe learning environment. It's a delicate balance. Brain based experts call this "matching states." Eric Jensen defines "state" as the "snapshot of the mind-body in one moment: your brain's chemical balance, body temperature, posture, eye pattern, heartbeat, EEG, etc."¹² Matching states requires creating a learning environment that is as close as possible to the environment in which the skills will be used.

The U.S. military learned the wisdom of matching states when it began changing its training techniques to more closely match the conditions of a real war. The previous military training schedules were less stressful but research showed that new soldiers became instantly overwhelmed when confronted with real combat.¹⁸ Their panic risked not only the goal of the mission; it risked their lives and the lives of their comrades. Now the U.S. military training is as stressful, lifelike and chaotic as possible. Few military

Boot Camp participants will rave about the wonderful time they are having during the training, but then again, war isn't supposed to be a good time. They are being trained to instinctively react well in the environment for which they are headed.

Now we are certainly not implying that leadership development is supposed to be like war. However, it is no secret that real leadership experiences are often stressful. Ronald A. Heifetz, Director of the Leadership Education Project at Harvard contends that substantive leaders are influential precisely for their ability to live between the tensions of opposing or competing interests. He says that simply learning “how to manage sustained periods of stress...poses a central question for the exercise of leadership.”¹⁹ Tero therefore purposefully creates an environment which draws participants out of their comfort zones. Do they feel stressed in the Tero leadership program? Yes. They often do report feeling stressed; but stress is a) very engaging and b) realistically transferable back to the way leadership really feels in the real world.

But even that isn't enough. Learning must be engaging, transferable AND aligned with the company's strategic goals. Before launching any type of training program, Tero trainers meet with the executives or representatives from the client organization to gain a clear sense of their goals or desired outcomes for the training class. With the leadership program, the goals are defined even more broadly. Tero meets with the company representatives and executives and gains a clear understanding of their *company's* strategic goals. These goals will set the course of the leadership development program and the program's success is judged not only against the yardstick of personal growth, but against how well participants further the company's strategic goals with their leadership projects.

Naturally, for a client's executive team, sharing strategic goals with an external training firm is not without risk. They have to place their trust and confidence in the Tero team. In exchange, Tero is given the knowledge needed to link the leadership training initiative to the company's most important business goals. This insider knowledge—representing competitive advantage to the organization—is something that Tero holds in the strictest confidence, now and forever.

Training is not always the Solution.

It might seem unusual for a company whose survival is based entirely on revenue derived from training to declare that training isn't always the solution, but the fact is, it isn't. Tero believes that training is only the solution when people want to do things more effectively, are empowered to do so, but do not know how.

After years in the training business, Tero trainers have seen too many instances of training used as a band-aid. Normally, this occurs shortly after something has gone wrong. It might have been an incident of employee conflict, harassment, or a series of botched presentations. Someone within the organization suggests that the solution is more training. And, organizations like Tero get called with requests to come “fix their people.” With a little digging and a lot of listening, what Tero sometimes finds is that the “people”

to whom they were referring are not the problem. The problem might be a flawed, outdated or failing internal system or process, a stifling corporate culture that inhibits initiative or stymies accountability or a management that cannot relinquish control.

As much as Tero would like to help, we know that if or when training is applied in this type of environment, people will get all excited about the new ideas and helpful suggestions...and then go straight back into the environment that does not support the use of those new skills or ideas. Participants end up more discouraged than if they had never attended the training session. Later, when the organization realizes that it still has the problem it was trying to solve, the training is deemed a failure because it did not “fix” the people as was intended. Tero is not willing to risk its credibility by accepting training jobs when training is not the solution. To help us discern the real problem we draw from the advice of performance consultants, Dana Gaines Robinson and James Robinson, Tero trainers often start conversations and training design assignments at the end and work backwards by asking company executives or managers what they want their people to do “more, better or differently as a result of the training.”²⁰ In situations in which we were not able to help them articulate their intended goals, or when their goals do not require training, Tero has turned down business opportunities.

Trainers Go Home

An in-house training department can check up on managers and participants from time to time and suggest corrective measure when necessary. Indeed, one of the liabilities of an external training company is that it isn't as easily available to follow up on the progress of the skills developed in training. However, the truth is that it is neither the in-house training department's job NOR the external training company's job to make sure skills are being used. Use of skills learned in training is ultimately and most appropriately the responsibility of the individuals who commissioned and participated in the training.

When Tero trainers go home it just reinforces the responsibility that should always rest squarely on the shoulders of the participants and the people that contribute to the environment in which they work. For this reason, Tero's assumption is that good training should end. If a trainer does his/her job correctly, the client should arrive at a level of competency at which the trainer is no longer required. This is not to say that Tero conducts a training session and then sprints off into the night never to be heard from again. Tero trainers *are* available for refresher courses or questions at any time. However, the intent is to leave at some point—leaving behind a group of newly trained people in an environment that will support and reinforce the skills they just learned.

Learning Takes Time

Gaining competence in any new skill or subject matter takes time. Gaining competence in the social, emotional and strategic abilities of leadership takes even more time. They are a very complex set of skills that require real-time judgment and simply *knowing* about a body of knowledge is vastly easier than gaining mastery over it as a style of relational interaction.

How much time should one invest in personal and professional development? Recommendations vary, but most experts on the subject acknowledge that the time commitment is a significant one. Leadership experts Jim Kouzes and Barry Posner recommend that professionals dedicate 50 hours per year to learning but point out that companies such as Motorola and Solecton—Baldrige National Quality Award winners—invest at least 100 hours per person annually. Authors Sherron and Boettcher recommend dedicating 180 hours per year to development.²¹ The Center for Creative Leadership and the Gallup Organization weigh in with similar recommendations. They explain that the time needed to gain proficiency in a set of skills is approximately 1,000 hours per year. Of this, 10 percent or 100 hours should be invested in formal training or learning new knowledge, 20 percent in coaching or mentoring activities and the remaining 70 percent in opportunities to apply the new knowledge and skills on-the-job.²²

Why so much time?

As neuropsychologist Daniel Goleman describes it:

Teaching about a competence...has the least effect on actually changing performance. Deep change requires the retooling of ingrained habits of thought, feeling and behavior.

Purely cognitive abilities are based in the neocortex, the “thinking brain.” But with personal and social competencies, additional brain areas come into play, mainly the circuitry that runs from the emotional centers—particularly the amygdale—deep in the center of the brain up the prefrontal lobes, the brain’s executive center. Learning emotional competencies retunes this circuitry...As we acquire our habitual repertoire of thought, feeling and action, the neural connections that support this repertoire are strengthened and become dominant pathways for nerve impulses. While connections that are unused become weakened or even lost (“extinguished”), those we use over and over grow increasingly stronger. Given a choice between two alternative responses, the one that has the richer, stronger network of neurons will win out...When habits have been well learned, through countless repetitions, then the underlying neural circuitry becomes the brain’s default option. We act automatically and spontaneously².

As an example of how the neural pathways work in the brain during training consider this scenario: You decide to take a new route from the parking lot to the front door of the building. Picture an office building with paved walkways leading from the parking areas to the front door. The paved areas represent the old habits of thought and response. In the non-paved areas around the walkways, there is grass. The grass represents potential for change toward more effective practices. Most people, out of force of habit, will probably stick to the paved walkways when making their way to and from the building; to do so is easier and doesn’t require the thought and effort of trying something new. If, however,

you decided that the shortest path from your parking space to the front door was not the paved walkway, but rather a shortcut across the grass, you might chart a new course across the lawn. Initially, you might find it less comfortable than the established path. After all, the grass clippings or mud would stick to your shoes, if you were wearing heels, they might sink into the soft dirt. You might even decide it wasn't worth the time you saved and revert to the established path. If so, there would be little evidence of your experiment. The grass would spring up again in good spirits and good health. However, if you (and others) decided the shortcut was the better route and began routinely taking the shortcut across the grass, after a while the grass would wear away and form a small dirt path. Years later, the dirt path would be wide, hard-packed clay. The building maintenance crew might even decide to repave the paths around the building to reflect the common traffic usage.

The good news, Goleman says is that people, even adults can retrain their brain to naturally respond in new ways. The bad news for the time-pressed organization is, of course, that this takes a lot of time and practice. You can create a new path, but it will take months, or even years of walking back and forth over the same small plot of ground.

Tero's leadership program is typically six to eight months long. A common reaction to this news from potential participants is often, "Wow that sounds like a really long time. Couldn't you condense it down to a week or a couple of half-day sessions?" The answer is: Technically yes, the program could be shortened, but you won't get the results you seek. In a shorter time frame (and six to eight months is pushing the limits as it is), participants might learn *about* leadership, but as Goleman suggested, they will not experience the deep, retooling of their habits of thought and behavior. Moreover, Tero's experience has taught us that participants typically start the program with excitement and confidence and then get discouraged and stressed about midway through the program (shortly after they realize the enormity of their task). We have also learned that they can be expected to recover and even exceed their initially high levels of confidence provided they are given the time and support. To truncate the program would be to risk leaving them stranded in a desolate halfway point—neither where they were (ignorant bliss) nor where they will discover they can be if they take the time to make the journey (improved performance). So functionally, the answer is "No." Tero can't (or rather, won't) shorten the program and guarantee the same results. To do so would compromise the integrity of the program and the company.

Skill-Building Requires Support and Reinforcement

Consider the path on the lawn example once again. Imagine the same scene again—the office building surrounded by grass but accessible by paved pathways to and from the parking lot. Now envision that scene, but under the onslaught of a driving Iowa snowstorm. Picture the grassy areas under two feet of snow with even more falling at a steady pace.

This is an allegory of leadership development in an unsupportive environment. In order to develop new skills or habits of thought and response in a workplace that isn't invested is

his or her growth, not only would an employee have to take the initiative to strike out on a different path, but he/she would have to do the equivalent of trekking through two feet of snow as well. This would be arduous and frustrating. Not only would their effort take more time and energy, they are likely to see little result as the snow continues to fall and cover their fresh footsteps. Most sensible employees will decide it isn't worth it and revert to the established (probably plowed) path. A few will decide they *must* take new paths and simply leave that building and the snow and move to a warmer climate where the grass is always green and inviting. Most, however, will neither move, nor continue to try to chart a new course. The snow will continue to fall and all evidence of their foray into unknown territory will be "extinguished."

Tero's assumption about skill-building is that it will be hard. It will take time and effort and that it will not "stick" to a really helpful extent unless it is supported in the corporate environment after the training session is over and the trainers have gone home. Therefore before any training session—and especially leadership development programs—Tero employees spend hours in meeting with representatives from client organizations to try to learn more about their culture. This helps the trainers tailor the training to the culture and the salient issues of the organization. An added benefit is that customizing the training to the environment makes the content of the training more relevant which brain-based learning experts like Eric Jensen contend is one of the keys to attention and retention¹². One of the greatest compliments ever given a Tero trainer was; "Wow! How do you guys always seem to know how to hit our issues square on the head? It seems like you work here!"

Tero trainers also secure commitment from key players in the organization during the pre-training meetings. Due to the intensive nature of the leadership program, Tero routinely collects (written) commitments from the participants and the key players in the organization pledging their support to the reinforcement of the new skills during and after the training sessions.

Skill-Building Requires Dedicated Attention

The participants and their organization have to do their part, but that certainly doesn't mean the trainers are off the hook. Tero trainers not only have to go through an extensive training certification process themselves, the intensive nature of the Tero leadership development program demands their constant attention.

Tero has chosen a co-facilitation strategy for most of its programs and Boot Camp is no exception. This approach, although costly in terms of time and resources, is very effective. Tero has observed the following benefits:

- It guarantees a small student to facilitator ratio resulting in more personal attention for participants.
- It ensures trainers stay fresher and sharper since they share facilitation roles in the classroom.

- It ensures that trainers are always supported, and as a result, more confident.
- It enhances decision-making and saves time on program improvements since two people are familiar with the unique situations and can discuss/debate any changes that may be appropriate to make in “real time”.
- It ensures that one trainer is always available to observe group dynamics and non-verbal communication so that questions or frustration can be identified and addressed more quickly.
- It guarantees that at least one trainer will always be at the training site, on schedule, absent exceptional circumstances.
- It achieves the difficult balance of expertise and consistency.

Expertise because each trainer brings their own unique specialties to the training. Since the range of topics covered during the six to eight month training program is so diverse, a single trainer cannot be and is not expected to be an expert in every area. During their training, participants will see at least two, and frequently several, Tero trainers each trained and certified in one or more areas relevant to leadership development.

Consistency because regardless of the number of Tero trainers involved in a program, at least one Tero trainer is present and attentive for every session. This person has the advantage of evaluating the day-to-day participant experiences, assessing the changing group dynamics and weighing these against the big picture and overall program goals to make recommendations and adjustments as appropriate.

3. The Path of the Leadership Development Program

Program Overview

Tero's Leadership Development Program—or “Boot Camp,”—has more than five years of research, curriculum design and program development; three years of implementation in a variety of organizations and the collection of abundant data (statistical, observational and testimonial).

There are four parts to the program:

1. **Basic Training:** Participants in the program experienced more than 90 hours of skill-based training, over a period of six to eight months. The training focused on important skills such as presentation skills, negotiation, listening, conflict resolution, taking action, motivating others, leading teams, selecting top performers, goal setting, time management, change management, stress management and the like. All of the training was linked to the company's strategic goals and unique culture.
2. **Company-Specific Training:** In many cases, participants were also involved in more than 20 hours of company-specific education that included tours and presentations about different parts of their business. The goal of this portion of the training was to provide participants with a broad understanding of the whole organization.
3. **Mentors:** A mentoring component ensured that this program was truly an integrated part of the organization. Tero's goal was to make the program as systemic as possible. As a result, mentors from within the business were trained to assume their mentoring roles and provide guidance to the workshop participants as they went through the challenging process of unlearning old habits and developing new ones.
4. **Leadership Projects:** To ensure that the program was more than an education without practice application, the participants were asked to identify projects to lead that would make a meaningful difference to the business.

The results by most definitions were breathtaking, as measured both on a quantitative and qualitative basis. The statisticians who analyzed the quantitative data concluded that the results were statistically, educationally and practically significant. But the numbers only underscore the obvious changes observed. The overall feedback has been positive and the stories continue to testify to the growth of these leaders and the important roles they play in their organizations now and in the future. Additionally, comparative research on other intensive leadership development programs showed that Tero's Boot Camp leadership development program achieved much greater than average results with a financial investment much lower than average.

The following is a chronological look at Tero's Boot Camp, how it began, the program content, customization options, how it changed over time, results achieved and

conclusions we reached about training based on the data, our own observations and our participants' unique learning experiences.

The Birth of “Boot Camp”

Until 1998, the longest of Tero's proprietary programs was two full days. Each of the two-day programs focused on pieces of the skills necessary for effective leadership. The following are some examples of the programs Tero had already developed and was using with clients before the creation of its leadership program.

- Tero's IMPACT[®] – How to Speak Your Way to Success is a two-day presentation skills program. Participants discover how to persuade an audience and present ideas with confidence and conviction.
- Tero's Team Dynamics: The Art of Bringing Out the Best in Others is a two-day workshop that applies the insights of the Myers-Briggs Type Indicator (MBTI) to enhance self-knowledge, self-regulation and workplace relationships.
- Tero's Time Management Through Goal Setting is a two-day program designed to help people align their activities with their goals rather than letting the “tyranny of the urgent” get the best of them.
- Tero's Selecting Top Performers is a two-day recruiting and interviewing skills program that takes participants beyond simply interviewing for technical competencies and shows them how to evaluate candidates for a perfect fit in three critical areas: cultural fit, job fit and motivational fit. This program also supports the framework for other important human resources systems such as promotion, termination, performance appraisal, employee orientation, succession planning and employee development.

The above four programs were certainly not the whole of Tero's offerings, but were functionally (and even symbolically in the minds of clients), the critical mass.

As discussed earlier, the idea for the leadership program developed out of a long-term, informal study of leadership. Tero trainers noted that of all the “qualities,” “competencies” and “styles” admired or pursued in leaders, most had little to do with mastery over a body of knowledge. Quite the contrary, what leadership researchers around the world were finding is that people look for the “essentially human characteristics,”²³ like credibility,²⁴ strong interpersonal skills and the ability to “sell” ideas.⁷ Researchers also found that although industry knowledge, technical competence and basic brainpower were important, they were not enough to turn relationally incompetent people into leaders. Leadership is after all, fundamentally, a relationship. Kenneth Blanchard and Paul Hersey described it as a “transactional relationship” of give and take between leaders and followers.²⁵

Tero knew that it could offer clients excellent training on the personal and relational side of leadership. So, the Tero training designers spent about six months bundling together the best of its programs and creating new course material to represent ninety full hours of classroom training. Around the office, Tero employees began to call the program Boot Camp because of its intensive nature. Boot Camp coursework consists of three primary sections spread over the course of approximately six to eight months.

Pre-Program Preparation

Long before the first Boot Camp class session began, Tero trainers spent hours in several short meetings with a small group of several people representing the client. Usually, the small group consisted of the company president, vice president of human resources, and the training manager. The pre-program meetings were a good time to identify the population of employees who would participate, accommodate requests for customization, clarify expectations, train mentors and set up times to learn about the company's strategic goals.

Suggested Participants

During these pre-program meetings, Tero often helped the client identify who will attend the training.

Tero's belief was that although the program would be beneficial for all levels of management, it is ideally suited to a cross-section of individuals. The benefit of training leaders throughout the company is that during times of uncertainty brought on by change, there will be leaders at all levels of the organization to help lead people through the fog of the unknown. It is this momentum dispersed throughout the organization that creates the energy described by leadership researchers Noel Tichy and Eli Cohen in their book *The Leadership Engine*.²⁶ Furthermore, Tero wholeheartedly agreed with writer Charles Fishman who contends that lasting and meaningful change efforts are only successful when they are led by the people who will live with them.²⁷

It is for this reason that Tero chose not to focus its program only on the people at the top of the organizational chart. In the same way, the course content purposefully steers away from case studies of the big-name larger-than-life leaders so commonly portrayed by the media or in leadership literature. Jack Welch, Bill Gates, Larry Bossidy, Bob Galvin and their ilk are all admirable leaders. However, Tero trainers felt that running a leadership program that holds up larger-than-life personalities or accomplishments might be inspiring but can distance the learner from embracing their own call to action. Tero's intent was to train the "everyday leaders" to take action with the people and issues they have near them in whichever capacity they serve.

Customization

Customizing any program for a client generally means much more work for the instructional designers, office staff and trainers. Tero learned that with each iteration of

the Boot Camp program, customization presented a host of logistical complications which had to be managed behind the scenes so the client had a seamless experience. Customization also meant that a one-to-one comparison of the research results and/or curricula wasn't possible. However, the results are worth it. Therefore Tero continued to present the customization option to potential clients and they usually accepted it.

Once a client decided to customize their Boot Camp program, Tero designers and trainers worked backward by asking the client representatives to clarify their objectives for the program and then proposing customization options that might further those objectives. Generally, this dialogue lasted over the course of several meetings until both sides were satisfied that the customization options were a) feasible and b) would in fact further the intended objectives. For example, several clients chose to supplement the leadership training experience with five or six customized half-day sessions to ensure that the participants were equipped not only with the skills necessary for leadership success but also with a comprehensive understanding and knowledge of all aspects of their organization. These sessions involved tours and presentations from various areas within the company. They also provided a venue for guest speakers (i.e., guest speakers from administration, information technology, human resources, research, operations, sales and marketing, etc.). Most of the customized sessions were developed and led by the program participants themselves which allowed them the opportunity to use the skills they were developing in the training for application in the real world.

Customizing the program for each client meant that no program looked exactly the same. In fact, even when the same client ran the program more than once with a different group of participants, the second round of training wasn't exactly like the first. Although the pieces of the program were substantially the same and the research questions were the same; the order in which they were facilitated or administered often varied significantly. As a result, it is impossible to make a straight apples-to-apples comparison between the programs.

So although the measurement and research of the program might have been compromised from a strictly academic perspective, Tero felt then and continues to feel strongly about the importance of a customized experience. Program customization is based on Tero's philosophical conviction that good training must be tailored to the client company's goals, the lessons learned from previous experiences and ultimately, the participants themselves. Another way to say this is that until companies and the people within them begin to look like and act exactly like apples; Tero believes that an apples-to-apples comparison of training experiences is neither desirable nor realistically probable. Therefore, it was within (customized) parameters that Tero attempted to conduct the Boot Camp training and administer the research of the training in as organized and controlled a manner as possible.

Clarifying Expectations—Likely Stress Reactions

Once the participants were identified, Tero trainers tried to establish clear expectations for the months to come. They did this by explaining to the company representatives that

they should expect participants to have heavy workloads, to feel frustrated (particularly about two-thirds of the way through the program), and to even talk about burnout. All of this is normal and stress was purposefully built into the program to simulate real life leadership as much as possible. Participants were also pre-warned about the time and effort the program would require and were asked to sign a “contract” stating that they will commit to the process. They were also informed that graduation from the program was not automatic. Tero has elected not to graduate participants who did not do the work required.

The pre-program meetings were also the time when Tero sets up the mentor training.

Mentors

The intent of the Tero leadership program is that it becomes a systemic part of the client’s organizational culture. Although Tero trainers tried to learn as much as they can about the company, its history and culture, they knew they could never know as much as the people who worked within it. Mentors from within the company are in the unique position to offer guidance about how to customize the leadership learning opportunities to their specific environment.

Each program participant was therefore required to select a mentor from within the organization. After the first training session, they were given a series of guidelines to use when picking their mentor. Some of the guidelines were:

- Someone that they respected for the qualities they would learn (e.g. social and emotional intelligence).
- Someone that would be accessible to them on a regular basis.
- Someone that would commit to putting aside time for regular mentoring sessions with them (face to face whenever possible).

Like the participants, the mentors would be asked to sign contracts to formalize their commitment to the process and to the development of their protégé.

Between the first and second Leadership program sessions, Tero conducted a mentor training session for the mentors (program participants do not come to this session). During the mentor training, mentors were given an overview of the program so they knew what their protégés would be doing over the following months. They were also given a short training session on the types of skills required of mentors as well as pitfalls to avoid. For example, mentors learned that they would have to fill several roles:

- **Champion:** To increase the exposure of the protégé in the organization with a view of advancing their career.

- **Role Model:** Provide a positive behavior example of professional conduct, leadership and good interaction with others.
- **Teacher:** To look for learning opportunities. To help their protégé stay focused, provide advice on accomplishing goals, give insight on potential barriers and help solve problems.
- **Counselor:** To provide a balance of emotional support and career guidance. To provide a safe environment where mistakes enhance growth without harming credibility.
- **Cheerleader:** To be encouraging and supportive.

In addition to learning the many roles they would have to play, the mentors learned that they must be skilled in three major skill areas.

- Creating a safe learning environment in which both individuals feel that they can share openly. Confidentiality is critical to building trust. Breaches of trust, real or perceived, damage the mentor/protégé relationship, sometimes irreparably. It is also important that the protégé feel the freedom to fail or disclose mistakes without danger of harming their credibility.
- One of the most important functions of the mentor is providing feedback. When providing feedback, the mentor must assess the readiness of the individual to receive the feedback. All feedback must be specific because feedback that is vague or theoretical is not as useful as that which is detailed and specific. To build a mutually beneficial relationship, it is also important that a mentor know how to receive feedback.
- Good communication skills, both verbal and non-verbal, are essential to a positive mentor/protégé relationship.

During the training mentors learned how their job was going to be primarily to listen well, ask good questions and avoid the tendency to do the work for their protégé.

The mentoring sessions between mentor and protégé throughout the Leadership development process were not completely unstructured. At the close of each Boot Camp session, participants were given a “Mentor Challenge.” Their assignment was to meet with their mentor before the next session and discuss the topic of that week’s Mentor Challenge. Some of the mentor sessions lasted 15 minutes and some several hours—the time tended to depend on the personalities of the mentor and protégé.

Later, at the beginning of the next Boot Camp session, participants were required to stand and give a short summary presentation of their most recent mentoring session (without divulging confidential information). The benefit of the short presentations was that they

allowed others to learn from other mentors while reinforcing the presentation and communication skills of the presenter in the front of the room.*

Tero trainers scheduled meetings with the mentors (as a group) at several times throughout the course of the training to gain a sense of how things are going with the mentoring relationship and to respond to issues or concerns. To date, all of the mentors have reported feeling “honored” to be selected for a mentoring role. A side benefit for the mentors was that they got a window into the training experience. Many of them said that they felt that they had learned as much as their protégés did through the training. Plus, many of the mentors continued meeting with their protégés even after they graduated from the program.

Training Aligned with Strategic Business Goals

According to leadership program researchers, Zenger, Ulrich and Smallwood, most traditional leadership programs fail because they start with competencies and focus on the individual. Their contention is that “leadership development should begin with business results and work back to abilities.”²⁸

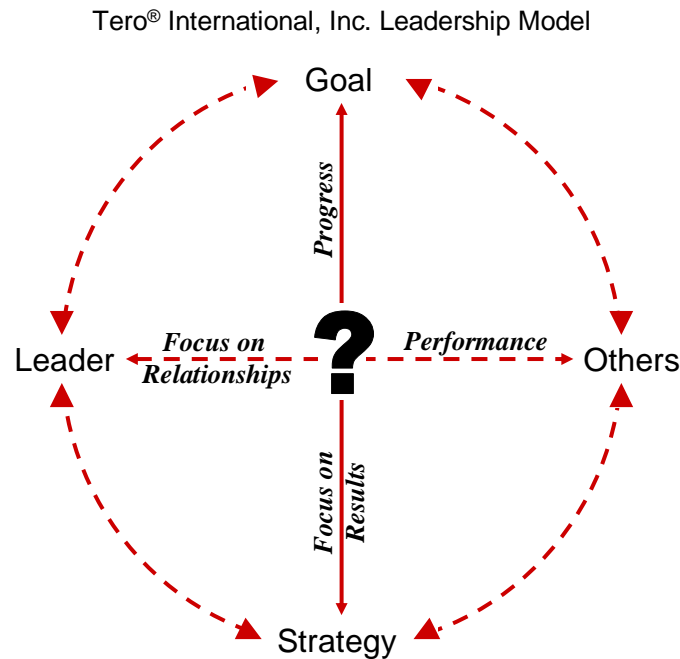
Indeed, focusing too heavily on the relational dynamics of a project may make for the *values* of teamwork, but as team gurus Katzenbach and Smith found, high performing teams only arise out of individuals committed to working well together toward a serious performance goal.²⁹ On the other hand, failure to dedicate the appropriate time and attention to the relational dynamics will ultimately compromise the project as it fails to elicit the best from each member on the team. Leaders must be attentive to both results and relationships. Although the theories on leadership are varied, a common theme of the credible research suggests that leadership begins with knowing oneself, but self-knowledge isn’t enough.

Figure 3.1 depicts Tero’s leadership model which shows the complexity of dynamics involved in good leadership. A leader must balance the process of self-knowledge and self-development with the cultivation of relationships through the development of others all while attending to a clear strategy in pursuit of a common goal—not an easy balance to strike! The solid line connecting strategy with goal represents the “hard” or strategic skills of leadership. The dashed line that connects the leader with others represents the “soft” or relational skills of leadership. Although some leaders approach the task with strengths in either relationship building or strategy, everyone has to learn how to balance the skills they have with the skills they have to learn – hence the need for purposeful leadership development in a safe and structured environment. Tero taught this balance in the Boot Camp program and strove to model it in relationships with clients. As the Tero leadership model also shows, all elements are interconnected and a weakness in any area can have implications on results, relationships or both. For this reason, at the center of

* The Boot Camp program began with Tero’s two-day IMPACT® - How to Speak Your Way to Success program. Therefore, for the rest of the program participants were held to the presentation standards they learned during the first two days.

Tero's leadership model is the reminder to leaders to constantly ask questions of themselves and others (who, what, where, when, how and why questions).

Figure 3.1



Tero could not hope to know as much about their business as they did and Tero's strengths were in training personal and interpersonal skills. Therefore, what would be a lopsided focus on personal and interpersonal skill-building (if left to Tero alone) was evened out through a heavy dependence on company representatives, mentors and the assignment of the leadership projects.

During one of the pre-program meetings, Tero trainers met with representatives of the client's executive team to gain a clear understanding of the organization's top strategic goals. If the company had not already articulated their top goals, Tero led them through an exercise to help them identify them. With the help of a forced sort instrument designed at Tero, executives were asked to translate the business strategy into cultural terms. Or in other words, they were asked to develop a description of the top ten behaviors that would be required by the members of the organization to reach their strategic goals. The executives were then asked to rate the organization from 1 to 10 for each of those cultural goals. An average rating of "1" indicated that the executives believed the organization was not doing a good job on that area at that moment. A rating of "10" indicated that they believed the organization was doing a good job with that area at the present, and that they wanted to continue to do well in the future. The top ten cultural goals set the course for the leadership participants. Their growth was measured partly against how they furthered one or more of those goals.

There was one important difference between Tero's attempt to use strategic goals as a guide for the learning and the advice proffered by Zenger, Ulrich and Smallwood. Rather

than starting with business results first and working backward toward personal abilities; Tero program participants worked on both business and personal/social growth at the same time. Tero's line of reasoning was that live leadership situations seldom if ever allow for the luxury of laying aside (inter-) personal issues to focus first on business results. Moreover, as long as organizations were made up of and moved forward by people, personal and interpersonal issues can *never* take a backseat. Tero participants were introduced to the leadership project assignment after one-third of the training was completed. In an ongoing attempt to "match states," participants were not given the luxury of deferring one issue over the other after the one-third mark of the training.

Leadership Projects

Since the best learning is first-person, present-tense and experiential, each of the Boot Camp participants was required to select a leadership project that would:

- Be an expression of their individual interests.
- Test their leadership skills.
- Further at least one of the strategic cultural goals their company's executive team set forth before the beginning of the training program.

They were also asked to choose a project that would stretch them beyond the parameters of their comfort zones.

To aid in the selection of leadership projects, in some cases, a meeting with the mentors and members of the Executive Team was held to create a list of possible project ideas for participants to consider as they selected the focus of their leadership project.

Participants were asked to complete formal proposals outlining their leadership projects. In the proposal, they were required to address the following questions:

- **Meaningful Difference:** How will the leadership project make a meaningful difference to the business? Which of the cultural strategy areas does the project address and how?
- **Plan:** What is the plan? Steps? Periodic progress reviews? Anticipated roadblocks? Team members? Strategy for building a team and getting people on board? Timeline? Results? Crisis management plan? Plan B?
- **Measurable Impact:** How will the impact of the project be measured? Measurement instruments?
- **Leadership Skills:** What leadership skills are needed to accomplish the project?

- **Passion:** Why are you excited about this project? How is this project a statement of who you are? Why are you uniquely qualified to carry out this project?

Prior to being accepted, project proposals were reviewed by mentors to ensure they would support the strategic goals of the organization. After approval by mentors, the project proposals were submitted to Tero for review and approval. Tero's goal in reviewing the projects was to ensure that each project would further the learning experience and require the workshop participant to use the skills they were developing during their training.

4. Overview of Course Content and Examples of Learning

This white paper is a description of the design, facilitation and results of Boot Camps conducted in several rounds or generations. Generation one programs were facilitated in 2001 and second generation programs were taught over 2002 and 2003.

In order to gain a complete understanding of the experience, Boot Camp must be understood as a whole. It was and remains a program whose impact is in the collaboration of its parts rather than participation in any single part. However, for the sake of clarity, this paper will attempt to build a foundation of the course objectives and course content first and then explain the other parts of the program, how they fit together and why Tero arranged them in that format.

Course Objectives

As mentioned earlier, with a commitment to focus on both desired business results and personal/social growth at the same time, Tero's goal was to build a formal training curriculum, supported by informal learning opportunities and support systems, that helped people develop the personal and interpersonal skills needed by leaders. A number of these skills are skills that are desired, arguably needed, by all individuals. Several are unique to leaders. Following is a list of eight competencies and their definitions that Tero targeted in developing curriculum for its Boot Camp. Naturally, many of these competencies are interrelated. They are described below alphabetically. Later, this paper will discuss how the learning for these competencies flowed during the training and the rationale for why.

Collaboration/Teamwork

- Finds common ground; gains cooperation in solving mutual problems.
- Effectively participates in meetings and groups.
- Encourages and values diversity. Acts in a way that indicates understanding and appreciation of others' personalities, concerns, feelings, thoughts, motives, needs, skills and competencies.
- Establishes consensus through group discussion.
- Helps each person articulate his/her own opinion or position.
- Is sensitive to the needs of the group and the individuals in it.
- Is candid and honest in expressing thoughts, ideas and feelings, while remaining sensitive to the thoughts, ideas and feelings of others.

Communication Skills

- Adapts communication to listener's needs.
- Checks for understanding.
- Listens attentively to the complete message (including body language).
- Restates and questions to ensure comprehension.
- Seeks to negotiate win/win solutions to issues.
- Clarifies problems and resolves conflicts; brings conflict or dissent into the open and uses it productively to enhance the quality of decisions.

Initiative

- Recognizes and reacts to problems.
- Self-starting.
- Takes action to achieve goals beyond specific job responsibilities.
- Readily faces up to and takes a stand on difficult issues.
- Makes decisions and takes actions before being directed or forced.
- Demonstrates a bias for taking action and doing things proactively.

Leadership Ability

- Provides and communicates strategic vision in order to mobilize others to action.
- Hires and assigns individuals suited to the culture and job based on competencies and motivational fit.
- Delegates responsibilities to optimize other's skills, competencies, strengths and interests.
- Creates challenging goals that energize and inspire self and others.
- Responsibly challenges the status quo and conventional practices.
- Experiments and takes smart risks to achieve innovative and effective solutions.
- Encourages wide participation in goal setting, decision making, planning and problem solving.
- Gives employees the authority and support to make decisions.
- Appropriately uses and personalizes recognition and incentives to reward.
- Sets a personal example. Shows consistency and maintains high standards of integrity and ethical conduct during both good and tough times.
- Learns from experience; gains insights from mistakes; analyzes both successes and failures for clues to improvement.

People Development/Coaching

- Recommends and supports appropriate education/training programs.
- Recognizes performance with positive feedback.
- Uses positive and corrective feedback to motivate.
- Focuses feedback on specific behavior, not the person.
- Recognizes exceptional contributions.
- Evaluates employees accurately, consistently and on time.

Personal Effectiveness/Personal Mastery

- Seeks to understand and exploit personal strengths.
- Strives to build competency in areas of weakness/blindspots.
- Is personally committed to and actively works to continuously improve oneself; actively pursues learning/self-development to enhance performance.
- Actively seeks and is open to new information and feedback from others; modifies one's viewpoint and/or behavior in response as appropriate.
- Functions effectively and maintains good relationships under stressful conditions.

Planning and Organizing

- Defines short and long-range objectives/establishes priorities.
- Uses time and other resources to achieve planned goals.

- Prioritizes quickly in an environment with many variables.
- Pursues tasks and goals with persistence, despite daily distractions.
- Achieves established goals by assigned deadlines.
- Meets commitments and fulfills promises.
- Responds to change with flexibility and appropriate speed.

Presentation Skills

- Presents self in a professional manner and creates a good first impression.
- Effective in presenting ideas to others in individual and/or group situations.
- Makes effective use of visual aids in presentations.
- Thinks carefully about effect of words, vocal quality and non-verbal actions.
- Uses appropriate learning styles and methods of persuasion to convince others to accept an idea, plan, activity or new product/service.
- Invites input/questions from others; facilitates open dialogue/exchange of information and ideas; listens actively and addresses both the logic and emotional position of audience members.

Course Content – The Basic Training

In pursuit of helping people develop the competencies outlined above, Boot Camp programs contained all or portions of the following Tero two-day workshops as part of the Basic Training. The specific curriculum selected was based on the unique customization needs of the client organization and the individuals participating in the training.

IMPACT[®] – How to Speak Your Way to Success

During this program, participants gain skills to:

- Discover how they are perceived by others.
- Recognize the verbal and non-verbal messages they send and the secrets about body language.
- Incorporate the most recent, relevant research to add IMPACT[®] when presenting.
- Persuade audience members to a course of action.
- Conquer fear and prevent nervousness from affecting delivery.
- Master the physical skills that convey confidence and conviction to the audience.
- Organize and visualize material so listeners understand and retain more.
- Use different learning styles to customize presentations to specific audiences.
- Think clearly under pressure and handle difficult questions and situations.

Team Dynamics – Bringing Out the Best in Others

During this program, participants gain skills to:

- Learn to understand and speak the language of personality type by gaining an understanding of their personality preferences and learning to recognize the characteristics of other personality types.
- Clarify the differences among the preferences of the other team members.
- Receive their personal, confidential Myers-Briggs Type Indicator (MBTI) personality inventory report.

- Discover that the language of personality preferences disarms “hot button” areas of conflict and sheds light on how to work together more effectively.
- Recognize characteristics of personality preferences by watching the differences emerge in fun and insightful group exercises and discussion.
- Apply their knowledge of personality preferences to the issues that affect teams the most: communicating, working through conflict, going through change, presenting new ideas, managing project timelines.
- Determine what to do before, during and after team meetings to make them more valuable.

Selecting Top Performers

During this program, participants gain skills to:

- Find a perfect fit between the company, the position and the successful candidate.
- Create and sustain a challenging, consistent and fair process in which each candidate can demonstrate his or her unique skills, knowledge and abilities.
- Support internal systems that are designed to achieve the organization’s goals for a diverse and talented workforce while meeting legal and government requirements for fair and non-discriminatory hiring practices.
- Increase (and sustain) the attractiveness of the organization and it’s professionalism to candidates and the business community.
- Elicit the most reliable and relevant information from candidates to ensure accurate and fair decision-making.
- Identify developmental issues for those who join the organization and issues to be addressed in the training and management of the successful candidate.

Time Management Through Goal Setting

During this program, participants gain skills to:

- Prioritize time according to goals.
- Explore and challenge unconscious habits, beliefs, values and self-image to determine the impact they have on productivity and success.
- Balance competing priorities.
- Assign priorities and identify the “real” priorities when everything is urgent.
- Overcome obstacles or barriers to success.
- Become aware of comfort zones, stress zones and the zones for optimum productivity.
- Discover how stress affects performance and techniques for stress recovery.

Additional training modules were developed by Tero’s research and design team around the following topics and customized based on the needs of the client.

- Meeting Facilitation Skills
- Listening Skills, Listening Styles, Barriers to Effective Listening
- Negotiating Win-Win Solutions
- Handling Conflict Effectively
- Expressing Difficult Emotions Constructively
- Business Etiquette, Dining Skills and International Protocol

- The Leader (influences of personality, culture, family of origin)
- Corporate Culture
- Peer Coaching (Action Learning Communities)
- Building and Sustaining Credibility
- Communicating a Goal/Vision and Gaining Commitment
- Creating an Environment that Fosters Inner Motivation
- Empowering Others and Lending Appropriate Strength
- Building Stress Strength

Course Content – Other Elements of the Program

The Basic Training described above was supported by a number of other critical learning opportunities and practical real-world activities. These elements of the program are described in detail in a later section of this white paper.

- Input and Support from the Executive Team
- Leadership Projects
- Company-Specific Training
- Self-Study Activities and Mentor Challenges
- Mentor Training Workshops
- Participant Meetings with Mentors
- Milestone Presentations
- Graduation

Program Format—Putting the Pieces Together

As mentioned earlier, the Boot Camp program is more than a sum of its parts. This portion of the white paper is intended to provide an explanation of the way the Boot Camp program was put together as clarified by the timeline of the delivery.

Figure 4.1 represents the whole of the formal classroom portion (Basic Training) of the program. At three times during their training experience, participants were immersed in a two-day intensive workshop focusing on a specific set of skills related to the competencies targeted by Tero for training. After each two-day intensive, participants returned (approximately) every other week for a half day follow-up “module” designed to reinforce and build upon the two-day intensives. As the program progressed, in addition to introducing new skills related to new target competencies, each formal training session built upon skills and competencies developed during previous sessions (for example, although specific training was provided in presentation skills and communication skills during Part 1 of the training, Tero continued to focus and build upon these skills in Part 2 and Part 3).

Additionally, in an attempt to meaningfully connect the competencies to their related parts of the training (rather than calling the training Part 1, Part 2 and Part 3 or alternatively, laboring over the long list of competencies targeted in each part), for simplicity, Tero assigned a label to try to capture the competencies that were the focus of each part of the training. Part 1 was labeled Communication. Part 2 was Leadership.

Part 3 was Personal Effectiveness. Around Tero and in the client companies, the language used to describe the 3 parts of the training would be these labels.

Figure 4.1

Tero® International, Inc. Boot Camp Leadership Development Program
Basic Training - Program Format and Target Competencies

Part	Program Format	Competencies Explored/Developed	Label
1	Two-day Intensive	Presentation Skills Communication Skills	Communication
	Half-day Module		
	Half-day Module		
	Half-day Module		
2	Two-day Intensive	Leadership Ability People Development/Coaching Initiative	Leadership
	Half-day Module		
	Half-day Module		
	Half-day Module		
3	Two-day Intensive	Personal Effectiveness/Personal Mastery Collaboration/Teamwork Planning and Organizing	Personal Effectiveness
	Half-day Module		
	Half-day Module		
	Half-day Module		

It might have been less disruptive to offer each of the three parts of the training in concentrated blocks like week-long retreats. However, Tero trainers were trying to avoid the “mountain-top” phenomena. Combining intensive retreat-type workshops with short half-day modules allowed the participants to reap the benefits of intensive skill-immersion opportunities while also breaking the training up into bite-size pieces allowing participants to learn some new skills and then go back into the work environment to practice, talk with their mentors, etc. Moreover, each follow-up session began with a participant presentation of their progress over the prior week or two and/or conversations they had with their mentors. This allowed them not only to debrief the experiences they had, it also reinforced the communication skills they learned in the first two-day session while in the safe learning environment of trainers and peers to provide insight and feedback.

As the training progressed, the trainer’s goals were to say less and less and let the participants give each other the majority of the feedback (in pursuit of further building their skills in competencies such as people development/coaching and personal effectiveness/personal mastery).

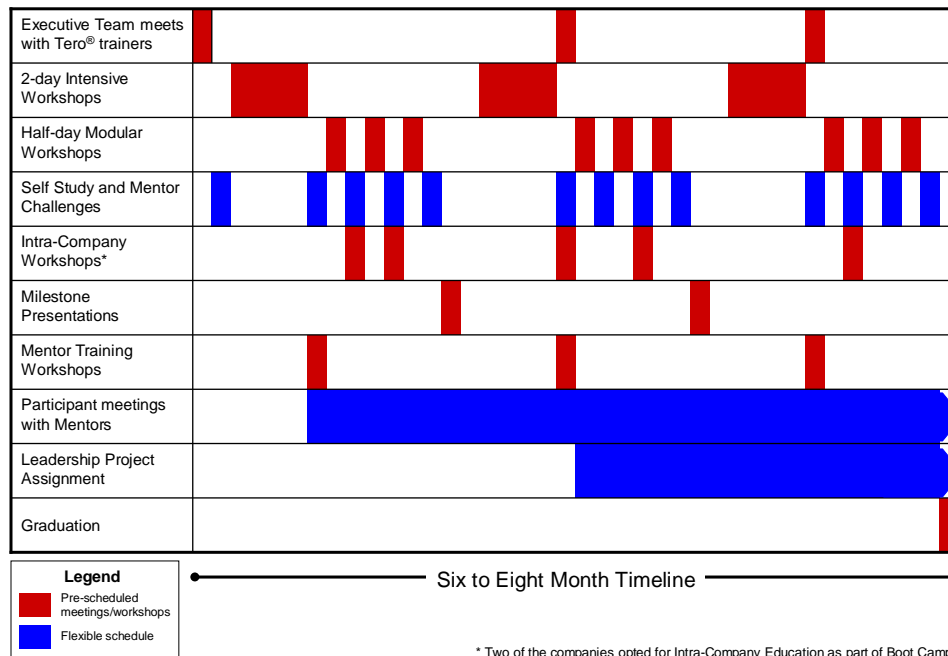
It might seem odd to dedicate the first two months of a leadership development program to presentation skills and communication skills and then (finally) begin to touch on leadership-specific skills in the third and fourth months. Tero designers purposefully organized the course content in this way not only because communication skills consistently top the list of skills required for effective leadership but also to build participant confidence regarding their ability to learn and implement skills by starting with a slightly more defined and technical body of knowledge. Only after participants

were given two full months to learn and practice their presentation and communication skills were they led into the challenging topic of leadership-specific skills and presented with the challenge of identifying and executing their own leadership project on which to practice their leadership skills. Given the complexity of the content and the psychological and social risks associated with the leadership projects, the support of and accountability to a mentor within the organization was particularly important for the success of this portion of the training.

Figure 4.2 shows how the different elements of the Boot Camp class fit together over the course of the entire program. The Basic Training was supported by a number of formal and informal activities, designed to ensure that the program was not merely a training intervention, but rather, a systemic part of the organization. Included in Figure 4.2, in addition to the formal training, are the other elements that contributed to the entirety of Boot Camp. They include meetings with the executive team, training workshops with mentors, intra-company education, self-study assignments and mentor challenges, participant meetings with mentors, the leadership project assignment, milestone presentations and graduation.

Figure 4.2

Boot Camp Program Sample Timeline (including all program elements)



The formal Tero training was discussed above. Below is an explanation of each additional element of Boot Camp.

Executive Team Meetings

Prior to the implementation of Boot Camp, Tero trainers met with members of the organization’s executive team and other individuals in the organization responsible for

commissioning the training. The goal of these meetings was to facilitate open communication about the elements and goals of the program, and to ensure that the program became a systemic part of the organization. Tero trainers used a Tero designed forced-sort instrument to help the executive team translate their corporate strategy into cultural terms (that is, the shared behaviors required by the individuals in the organization to achieve the company's corporate strategy). The outcome of this exercise – the top ten cultural goals for the company – would provide a foundation for customization of the training and the leadership projects the participants would propose during their training.

Later meetings would serve to update the executive team on the progress of the program and serve as a forum for discussions/debates for any changes/adjustments that may be required.

Self Study and Mentor Challenges

Participants were provided with an information packet and a pre-work assignment prior to the start of Boot Camp to help them prepare for their learning experience.

After each formal training session and prior to the next session, participants were required to carry out Tero assigned self-study activities. These self-study activities included a reading assignment from the training manual to reinforce some of the concepts learned and some specific instruction around incorporating the skills explored during the workshop into real-life situations. Unlike traditional school-type homework, the self-study activities (with the exception of the reading assignment) could easily be incorporated into a participant's normal daily activities meaning that extra time to complete homework assignments was not needed. Since the ultimate goal of the program was to help leaders and future leaders build skills for use in their day-to-day leadership roles, it made sense to ensure that the self-study assignments meshed seamlessly into their regular professional activities (and in many cases, personal activities).

Intra-Company Workshops

Two of the Boot Camp clients (Clients A and C) decided to add the (optional) intra-company education. The intra-company education was designed to a) give all of the participants a better sense of what each of the company's divisions do and how they all fit together and b) to give participants another chance to reinforce and practice their communication skills. Each intra-company educational session was hosted by a different participant (or set of participants with similar functions). The Tero trainers gave them a set of guidelines to follow, but gave them ultimate responsibility for the content and delivery of their own material

Milestone Presentations

Prior to the second and third two-day intensive sessions, participants made milestone presentations to their classmates, the executive team and their mentors about what they had learned and applied from the program to that point. Each participant arrived at this

session with a prepared formal presentation that detailed how the learning from the classroom was transferring to the real-world in general and to the organization in specific. In addition to helping the participants further develop their emerging leadership skills and competencies, these milestone presentation sessions also served to update the executive team and mentors on the progress of the Boot Camp training program. It was also at these sessions that post-versions of the formal measurement instruments used were administered.

Mentor Training

Individuals who were invited to serve as mentors for program participants were asked to attend a half-day training session to acquaint them with the goals of Boot Camp, their roles and the skills that would be required to help them fulfill their important roles.

Immediately after the assignment of the leadership project Tero met with the mentors again as a group to clarify expectations about their role in the leadership project and to answer any questions about the purpose and scope of the assignment. Tero found these meetings very helpful for several reasons:

- The timing of the mentor meeting was important because it was immediately after the first milestone presentation. In each program, mentors arrived to their mentor meetings full of excitement about the program having so recently witnessed its effects on their own and other's protégés.
- Mentors were able to listen to each other talk about their experiences so far. Those who had met regularly with their protégés served as positive role models for those who had not yet made it a priority. Peer pressure worked well to stimulate greater commitment.
- Tero trainers were able to answer any questions and address concerns that had arisen since the mentor training session.
- Tero trainers were also able to make sure that mentors understood the objectives of the leadership projects, and how they could be of greatest service to their protégés.
- Since many of the mentors were also executives, the mentor meetings were a good time for them to hear about the progress of the participants and further reinforced the sense of organizational commitment to the program.
- An unexpected benefit was that mentors gained a greater awareness of the skills their protégés were learning in class since the protégés had to first explain the skills or concepts before the mentor could comment on them. Several of the mentors expressed appreciation for this indirect exposure to the class.

Participant Meetings with Mentors

Boot Camp program participants were responsible for driving the mentor/protégé relationship. In addition to their self-study assignments, participants were asked to meet with their mentors between formal training workshops to complete their mentor challenges (to discuss and practice the skills explored during the previous workshop). Although face-to-face mentor meetings were encouraged, some meetings with mentors were conducted over the phone due to business need. The timing and length of meetings depended greatly on the schedules of the people involved and the personality types involved (for example, extroverts tended to have longer meetings than introverts). In some cases, the relationships formed were so important to the individuals involved that the mentor/protégé meetings continued beyond graduation.

Leadership Project Assignments

After establishing the foundation of the communication skills and good rapport with the participants in the first part of the training, Tero introduced the leadership project assignment. Usually, by this point in the training, the participants' initial anxieties had been calmed, and they were ready for a new challenge.

The leadership project was among the best learning opportunities in the Tero Boot Camp program. As mentioned previously, participants were told that they had to identify a project that would further one or more of the cultural objectives identified by their executives prior to the launch of the program. They were also told that their projects would have to require the help and commitment of others—if it was a solo project, it could be defined as “initiative,” but not leadership. Projects should have ideally been something of a stretch for the person and participants were cautioned not to avoid projects that had the potential of failing. The objective was to identify something they could get excited about working toward, and not necessarily an easy goal.

Graduation

The final class was reserved for graduation. It included a presentation that was an opportunity for participants to showcase all that they had learned and accomplished over the previous six to eight months. During their presentations, they were required to summarize the highlights of their own learning as well as the progress they had made on their leadership projects and intentions for “next steps.”

In many classes, participants chose to put on a skit, rather than a formal presentation to communicate the learning and changes that had taken place during their training experience.

After the presentations, Tero and client representatives (usually the president or the executive who had championed the program) would hand out the graduation certificates with great pomp and circumstance (literally—the music of “Pomp and Circumstance” was played as each participant accepted his/her certificate). In addition to the certificates of graduation, Tero awarded the “Graduation with Honors” certificate which is a peer-nominated award given to the person who had demonstrated the greatest growth.

Figure 4.2 demonstrates that many of the leadership projects AND mentor relationships continued past the graduation date. The benefits of this were that they allowed for ongoing coaching for the protégé and further enculturation of the course content into the organization's fiber. Figure 4.2 also indicates how Tero scheduled periodic meetings with the client executive team and representatives throughout the course of the training if they were not already part of the mentor meetings. Many of the times, the client representatives had been asked (and agreed) to be mentors and so the additional meetings were less frequent. However, the intent was to keep in as close a contact with the client representatives as possible.

5. How Clients Used the Program

Not one of the three clients highlighted in this white paper used the Tero Boot Camp program for the same reason—each had different but complimentary intentions. Also, even though Tero trainers refer to the program as “Boot Camp” (around the office), each client was allowed to rename it to fit the culture of their company and better reflect their goals for the program. None of the clients called their programs by the same name.

Client A

Program Name: Client A called their program “Ambassador Training.”

Target Audience: A cross section of employees. Participants ranged from plant-floor workers to Ph.D. level bio-chemists. Some of the participants had pre-existing managerial duties. At the time of this writing, this client has run the program twice. Twelve people in the company participated in the first generation of training and fourteen people from a cross section of the original company plus several affiliated companies participated in the second generation.

Objective: The objective of the program was two-fold; 1) to develop a core group of highly trained “Ambassadors” from all levels of the company from whom to draw upon to promote the company both inside and outside the organization. One of the key objectives was the participant’s speaking ability since the president intended to use them to give guided tours to everyone from foreign dignitaries to groups of school children as well as champion change initiatives to their own peers. 2) The second objective was, as the president said, to “give us another set of leaders internally.”

Because of this learning objective, Tero customized the third portion of the training to focus more explicitly on the role of the leader as a communicator. Participants spent more class-time than those in other client organizations practicing their communication skills. Tero organized and led off-site field trips during which participants benchmarked effective tour strategies. Participants also led one another on intra-company tours during which each participant took his/her turn playing tour guide to the rest of their participants. They were required to facilitate the entire thing and received feedback on their communication skills (from the other participants) as they went along and when they were done. The intra-company tours provided a natural way to “break down the silos” of the different departments and created enhanced understanding of the distinct parts of the company.

Enrollment Requirement: Participants in this client’s program were required to apply and interview before being admitted to the program. Admission to the program was viewed as an honor and a privilege. All participants graduated.

Ongoing Training: Due to the success of the first program, the program was offered a second time a year later to a different group of employees. The second group included 14 participants. This group was even more diverse than the first as participants came from

different business units, different departments, different backgrounds, different levels in the company and even different geographies. One participant, from another state, participated in the training remotely. He traveled to the training site for the 2-day intensive sessions and the graduation ceremony. All other portions of the training were delivered by telephone with the benefit of PowerPoint slides that were pre-sent. All 14 participants graduated.

Client B

Program Name: Client B called their program “Leading by Example.”

Target Audience: An entire front-line supervisory group of 22 participants.

Objective: As the president of the company said: “Our primary goal was to strengthen the leadership skills of our supervisor level of management. We focused on the effective leadership skills all centered around interaction with people. Training was designed to enhance confidence levels, promote teamwork among supervisors and strengthen communication skills.”

As a result of this specific learning objective, Tero customized portions of both Part 1 (Communication) and Part 2 (Leadership) to focus more on the notion of leaders in a learning organization. For example, in the Communication section, participants learned how to design and implement a training session for on-the-job training for their employees. They were required to practice this by facilitating the training session between the end of the two-day intensive and before the first follow-up session.

Enrollment Requirement: All front-line supervisors were required to attend the training. All but three graduated.

Ongoing Training: Client B is considering a hybrid leadership program in which they would combine elements of the Tero Boot Camp program with elements of a local university’s leadership program and offer it to upper level managers.

Client C

Program Name: Client C called their program “Leaders in Action.”

Target Audience: At the time of this writing, Client C has run the program twice. In both classes, participants were a representative cross-section of employees recognized for being “high potential” individuals. The first class (round one) was composed of nineteen people and the second class (round two) graduated twenty-three people.

Enrollment Requirement: Some of the participants asked to attend the training, some were “recommended” to the program (but did not realize they had the option of saying “no.”) All but three participants graduated.

Objective: The goal of Client C's program was to begin training leaders internally for the purposes of succession planning. Some of the participants were already in management positions, some were not. Tero customized portions of the training to include its Selecting Top Performers class which trains participants on how to conduct behavior-based interviewing sessions. As with Client A, Tero also added an intra-company tour component to the training at the client's request. Participants took turns leading one another on short tours of their department or division to give the others a deeper understanding of how all the pieces of the organization fit together. This customized addition contributed nicely to the client's goals to develop leaders who would have the leadership skills and company background to assume leadership positions in the future.

Ongoing Training: Due to the results demonstrated by the first program, the program was offered a second time a year later to a different group of employees. The second group included 23 participants. 22 of the participants were high-potential employees from the organization. One was a guest participant from a local University Extension office. All 23 participants graduated.

6. Research—Description and Results from First Generation of Boot Camps (2001-2002)

Tero’s primary interest in collecting research data on the Boot Camp programs was to be able to conclusively demonstrate that they produced the intended effects.

The research data was collected from each of the three client companies to use the Boot Camp program in 2001.

Description/Comparison of Participants in First Generation Boot Camp Programs

Figure 6.1 below is an overview of the Boot Camp client companies:

Figure 6.1

	Client A	Client B	Client C
Located in Des Moines, IA	X	X	X
Privately Held	X		
Publicly Traded			X
Employee Owned		X	
Agri-business	X		
Professional/Business Services		X	
Aerospace			X
R&D and Production Facilities On-Site	X		X
Training Spear-Headed by HR and President	X	X	X
Training was Mandatory		X	X*
Training was Voluntary	X		X*

*Client C’s enrollment was a combination of voluntary and mandatory. Many of the applicants were “encouraged” to attend at varying degrees by their supervisors.

Research on Tero’s Boot Camp program would be a much more representative sample if the sample had been a) bigger* and b) from other parts of the country. However, excluding those two variables, the sample was reasonably diverse in terms of size, industry, public vs. private, reason for implementing the program, and requirements for enrollment.

- The size of the companies varied from several hundred to many thousand employees.
- As almost all literature on leadership development suggests, support from people at the top is vital to success. Tero was fortunate in that each of the three client companies, the Boot Camp programs were steered and supported by the president as well as key members of the Executive team

* Since the Boot Camp programs have been offered multiple times, the combined sample size has grown and some tentative conclusions can be drawn.

- Enrollment requirements were left up to each individual client. As depicted in the above chart, one chose to make it mandatory, one voluntary and the third a combination of both. This breakdown was coincidentally similar to the statistics found in a study done by Training magazine and the AMA in 2002, 55% of leadership programs are a combination of mandatory and voluntary enrollment. 21% are completely mandatory (as it was for Client B) and 16% are completely voluntary (as it was for Client A).³⁰

The following is an overview depiction of the individual participants:

Figure 6.2

	Client A	Client B	Client C	2001/02 Overall
Male	7	5	15	27
Female	5	17	4	26
Caucasian	11	21	18	50
Native American	0	1	0	1
African American	1	0	1	2
Hispanic	0	0	0	0
Supervisory Responsibilities	5	21	7	33
Graduated from Program	12	19	16	47

Gender

Research jointly conducted by Training Magazine and the American Management Association (AMA) found that, on average, females represent only 33% of those selected to participate in leadership programs except in industries that have a higher population of women (e.g. healthcare and education).³⁰ Given that the 2000 US Census data reports that the current U.S. workforce is made up of 54% of women, it would indicate a potential gender bias against women in leadership still exists.³¹

The first generation of the Boot Camp program, however, was made up of 43% women overall. The client with the greatest number of women in its class was Client B from the business services industry. Client A had nearly equal representation of women to men which is particularly interesting given that it is from a company in the agricultural industry—an industry specifically mentioned in the Training/AMA study as being composed of only 13% women.³⁰ Client C—from the aerospace industry—had a predictably lower representation of women in its class with only 21%.

Race

The U.S. 2000 Census revealed that 23% of Americans originate from non-European backgrounds. Although surveys of participation in other in-house leadership programs indicate similar representation (22%),³⁰ the Boot Camp minority population represented a scant 6%. However, this small percentage must be considered in the light of the fact that Iowa has a minority population of only 5%.³¹ The Boot Camp classes, therefore

underrepresented by minorities when compared to the national average, were representative for Iowa where they were held.

Supervisory Responsibilities

In client groups A and C, less than half of the participants had existing supervisory responsibilities and half did not. Of the others, many had informal leadership responsibilities (e.g. leading teams, mentoring peers, etc.). The intention of both programs was to cultivate leadership within participants with an eye for formal leadership roles in the future.

Client B's class was purposefully composed of people with supervisory responsibilities. All of them were, in fact, on the same level of reporting authority in the company. Only one person did not have supervisory duties but was included in the activities because she was slated to receive them after the training.

Graduation Rate

6 of the 53 first generation Boot Camp participants (11%) did not graduate from the program. The reasons for failure to graduate included change of employment (to a different company), failure to attend enough of the class sessions due to business hardship, and failure to initiate or make significant progress on the leadership project.

The decision to fail a participant from the program was based heavily on input from Tero trainers, but was ultimately the choice of the client representatives. The most difficult decisions were the individuals who were *trying* to finish the program but had missed too many of the class sessions or failed to make headway on their projects. Tero's contention was that graduation should not be based strictly on their good intentions, but also on their performance—just as there are leaders who intend to do a good job, but fail to follow through. Therefore, graduation was reliant not on someone's intentions to do the work, nor solely their completion of it (since many of the projects were ongoing), but they had to demonstrate progress. One of the participants who did not graduate the first time has indicated an intention to take the class again when business pressures are alleviated.

First Generation (2001/02) Boot Camp Research Construction

Tero trainers did have participants fill out "happy sheet" evaluations at the end of many of the two-day intensive sessions. The results of these were not, however, considered substantive enough to count as real research and were therefore not included in the assessment data described below. Instead, the evaluations were reviewed by the trainers who conducted the sessions and then copied and delivered to the client representatives to keep them apprised of the participant's initial response to the training.

Assessments—Administration and Construction

On the first day of each two-day intensive training session, first generation Boot Camp participants were asked to complete an assessment in which they rated their own skill-level or competence in two areas: self-esteem and the competency areas related to the part of the training they were involved in. For example, on the first day of their training, the participants filled out an assessment with questions about both self-esteem and skills related to the competencies of presentation skills and communication skills. At the milestone presentation—marking the end of the first section of training—they were asked to fill out the exact same survey. This sequence was repeated for the second and third parts of the training and the assessments were customized to include questions pertaining to the skill areas of those specific segments. Only the self-esteem questions stayed the same for each section.

It should be noted at this point that building self-esteem is not a specific learning objective of the program. As a result, self esteem is not a specific learning unit of the training. When an organization invests in the growth of its employees in an intensive program such as the Leadership Boot Camp Program, and when the participants realize they are growing and learning in a number of areas, it is reasonable to assume that self-esteem increases. Since research shows that an increase in self-esteem has been linked to improvements in productivity and effectiveness, self-esteem was measured throughout the training.

The assessments for Part 1 (Communication) and Part 2 (Leadership) were composed of 24 questions with choices ranging from “Not at all like me” (1) to “Very much like me” (5).

For example:

“I am confident speaking in front of groups.”

Not at all like me	Not very much like me	Somewhat like me	Fairly much like me	Very much like me
1	2	3	4	5

The assessment for Part 3 (Personal Effectiveness) was 15 questions long with the same five-point ranking option (1= “Strongly Disagree;” 5= “Strongly Agree).

For example:

“I manage my time effectively.”

Strongly Disagree	Agree	Don't Know	Agree	Strongly Agree
1	2	3	4	5

Some of the question were designed to measure knowledge (“I know how to . . .”) while others were designed to measure behavior (“I do . . .”).

Each of the three assessments was determined to have high levels of validity and reliability by professional statistician Dr. Jim Veale from Drake University and Dr. Tom

Westbrook, professor of Adult Learning at Drake University with whom Tero contracted to evaluate the assessments and the data they produced.

Assessments—First Generation Boot Camp Results by Company

The assessments were all administered to the first generation Boot Camp participants over the course of 2001 and early 2002. Only participants who filled out both pre- and post-assessments were included in the sample for that specific section of the training.

Client A’s (First Generation) Results

Figure 6.3

	Communication	Leadership	Personal Effectiveness
Statistically Significant	--	--	50 th to 77 th
Practical Significance	72.70%	70%	81.80%
Longitudinal Data (Self-Esteem)	N/A		

Statistical Significance

The t-test for the pre- to post- differences in average score for both Communication and Leadership assessments as a whole did not yield statistically significant results. However, the differences in average scores were positive. The only assessment that showed a statistically significant improvement between pre- and post-assessment scores was in the Personal Effectiveness section of the training. The participants’ average scores on the pre-test were 3.95 and on the post-test 4.44. Moreover, if one had plotted the Personal Effectiveness pre-test score as falling squarely on the 50th percentile of a bell curve, the improvement in self-assessment after the class indicates a shift all the way to the 77th percentile.

Practical Significance

The practical significance for both the skills learned in the Communication part and the Leadership part of the program demonstrated that 72% of the class indicated an increase in their self-assessment of their skills after the Communication portion of the training. 70% felt they’d improved after the Leadership portion of the training and 81.8% of the participants assessed themselves at higher levels after the Personal Effectiveness of the program.

No longitudinal analysis was performed on Client A’s research data.

Client B’s (First Generation) Results

Figure 6.4

	Communication	Leadership	Personal Effectiveness
Statistically Significant	50 th to 73 rd	--	50 th to 87 th
Practical Significance	70.60%	50%	93.80%
Longitudinal Data (Self-Esteem)	From 4.16 to 4.59 Over Six Months		

Statistical Significance

Client B participants demonstrated a statistically significant increase in their self assessments after the Communication and Personal Effectiveness parts of the training. Their average overall scores went from 3.88 to 4.098 after Communication, and 4.37 to 4.67 after Personal Effectiveness. When the data is plotted on a bell curve, this would indicate that their self-assessment scores went from the 50th to the 73rd and 87th percentiles respectively. The second segment of the program, Leadership, did not yield a statistically significant difference.

Practical Significance

70.6% of Client B's participants indicated an improved assessment of their skills after Communication. Only 50% indicated an improvement in their skills after the Leadership part of the program and 93.8% indicated an improved perception of their skills after the Personal Effectiveness portion of the training.

Longitudinal Study

A comparison of the self-assessments on the eight self-esteem questions that appeared on all pre- and post-assessments over the entire eight month program revealed a statistically significant improvement from a score of 4.16 to 4.59 on a 5-point scale, or 9%.

Client C's (First Generation) Results

Figure 6.5

	Communication	Leadership	Personal Effectiveness
Statistically Significance	50 th to 90 th	--	Marginal
Practical Significance	88.20%	63.60%	72.70%
Longitudinal Data (Self-Esteem)	From 3.73 to 4.29 Over Eight Months		

Statistical Significance

As with Client B, Client C showed a statistically significant improvement in the post-tests in the Communication and Personal Effectiveness parts of the program. After the Communication portion of the training, Client C's participants average overall self assessment scores moved from 3.48 to 3.88 which would indicate a move from 50th to

90th percentile if drawn on a bell graph chart. The significance after the Personal Effectiveness post-test was only marginally significant: a change from 4.26 to 4.42.

Practical Significance

72.7% of Client C's participants indicated an improvement in their self assessment of their skills after the Communication portion of the training. 70% indicated an improvement in their perception of their skills after the Leadership portion of the training. Finally, 81.8% rated themselves higher after the Personal Effectiveness portion of the training.

Longitudinal Study

A comparison of the self-assessments on the eight self-esteem questions that appeared on all pre- and post-tests over the entire eight month program revealed a statistically significant improvement from a score of 3.73 to 4.29 on a 5-point scale or 11%.

Analysis of the Generation One Research Results

Comparison of Statistical Significance

The Communication post-test results demonstrated a statistically significant improvement in Clients B and C and a majority percentage of practical significance for all three clients. One can better understand the improvement when the before and after assessment is plotted on a bell-curve graph. If one assumes that the average participant is squarely average in the average distribution of self-assessed competence in skills (i.e. the 50th percentile), the results show that participation in the workshop moved them between 23 and 40 percentage points up into the 73rd and 90th percentiles respectively.

Because the bell-curve was neither normed against a control group of professionals who had not taken a leadership course, nor against individuals who had taken a different leadership course, it is difficult to say where on the average distribution curve the Tero participants were before the training. One can only say conclusively that wherever they fell before the training, they perceived their skills to have advanced considerably as a result of it.

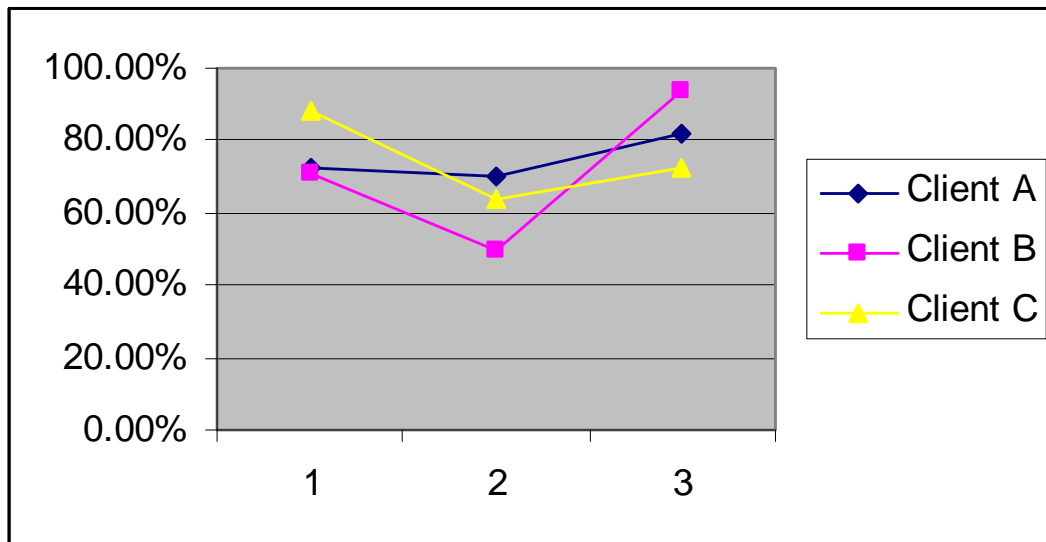
However, the growth is particularly significant when one compares it to the results of studies done on the importance of specific leadership abilities. In two recent studies, respondents rated "communication" as the most important competency.^{1 & 11} In the Training/AMA survey, respondents rated their leader's ability to manage conflict and negotiate effectively with an average score of 2.83 on a 5-point scale.¹¹ The Boot Camp participants of Client B and C classes ended with an average score of 3.99 on the overall post-test designed to measure communication skills. The specific question "I know how to resolve conflict effectively" was found to have improved to a statistically significant extent in both classes.

The Leadership portion of the training did not yield a statistically significant change in any of the clients. However, the Personal Effectiveness post-test results showed a statistically significant improvement for all three clients (although only marginally so with Client C). It would be difficult to know whether the Personal Effectiveness results represented a cumulative effect of lessons learned and confidence gained over the entire workshop or if it is, by itself, that much better than the previous two parts. Tero trainers incline toward the former possibility rather than the latter. Changes in the assessment instruments used in the second generation of Boot Camp programs would support the trainers' thesis.

Comparison of Practical Significance

Figure 6.6 below demonstrates a comparison of the practical significance results for each client over time. The practical significance percentage is the percentage of participants that rated themselves as having improved their skills after the previous segment of the Boot Camp program.

Figure 6.6

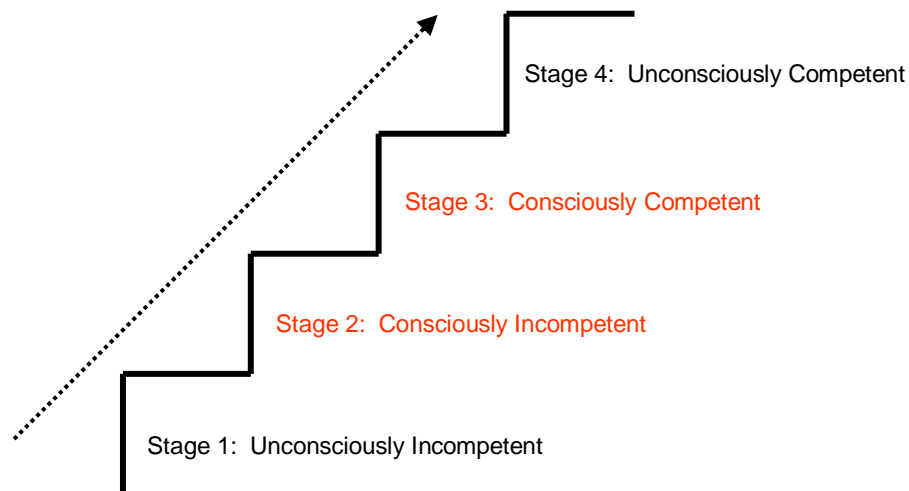


In all but two of the post-tests, at least 70% of the participants rated themselves as having improved their skill levels. In several, the percentage was as high as 80% and in one it was 93%. Only Client B dipped to 50% after Part 2 of the program. Indeed, Part 2 (Leadership) appears to be a low point for each of the clients as all of them dropped in the middle of the program and then climbed back up again by the third part of the training.

Tero had anticipated this dip in some degree due to regular usage of Humanist Psychologist Abraham Maslow's Stages of Learning represented Figure 6.7 below.

Figure 6.7

Abraham Maslow's Stages of Learning



Maslow's contention was that learners begin unconsciously incompetent (they don't know what they don't know). When they are presented with new material, they realize they don't know what they are doing and move to the second stage—consciously incompetent. Stage two is a very uncomfortable place for most people because most of us (particularly professionals) enjoy feeling competent. Stage three—consciously competent is also uncomfortable because, although a participant has learned the new skills, he/she really has to think hard about them before implementing the knowledge. Stage four—unconsciously competent is, of course the goal...until a new challenge requiring new skills comes along.

Tero had observed participants progress through Maslow's stages in previous classes and were accustomed to the typical drop in energy, enthusiasm and optimism that tends to accompany the overwhelming feeling of realizing the learning hurdles left to tackle.

For this reason, Tero trainers began to expect this dip in emotional reserves and optimism at about the two-thirds mark in the Boot Camp program. It was also generally about this time that participants, mentors and company representatives began to question the length of the program. One client representative once even expressed anticipation for the day when "it was all over and they could go back to normal."

It was precisely fear of "going back to normal" that led Tero to push for patience with the length of the program. Tero's theory then (and now), was that the dip in self-perception was representative of the difficult and necessary process of unlearning habits that were no longer adequate for current and future challenges and learning new ones. As writer and theorist Albert Hirschman observed;

*Like living systems, social systems under threat try to restore equilibrium. Generally, equilibrium means stability in which the levels of stress...are not increasing. Yet, there is nothing ideal or good about a state of equilibrium per se. Indeed achieving adaptive change probably requires sustained levels of disequilibrium.*³²

Ronald Heifetz further observed that when confronted with patterns of disequilibrium, there are generally three outcomes: 1) People use their existing repertoire of tools to solve the problem and restore equilibrium; 2) The problem presents a new challenge to people and they are confronted with the option of applying their comfortable habits to the problem to alleviate the symptoms (but not the cause) or; 3) they have to learn new skills to address the cause of the problem. Heifetz contends that real leaders are willing to engage the disequilibrium long enough to learn the adaptive skills that will address the real problem¹⁹. Most people, however, will not undergo this process willingly. It is therefore the supportive structure's—trainers, mentors, and executive's—job to do what leadership writer and speaker John Maxwell compared to Moses and the Israelites—lead them into the desert long enough to render return to Egypt a useless option.

Occasionally, Tero had to play a behind-the-scenes supportive role for the client's supportive structure. This was why Tero regularly scheduled update meetings with the client representatives and mentors throughout the course of the program. During the meetings, the trainers routinely reassured the client that the dip was normal and that the participants would climb out of it with time—and they did.

Of an interesting (although enigmatic) note is that the second phase of the training occurred near the time of the terrorist attacks on the World Trade Center and the Pentagon on September 11th, 2001. Tero did not attempt to measure the impact of these historical events on the participants' self-assessment and therefore it is unknown and probably unknowable.

Analysis of Longitudinal Research Results

The longitudinal research was performed on the eight self-esteem survey questions that appeared on every pre- and post-test given to Clients B and C over the course of the program (six times). The questions all pertained to the participant's assessment of their own self-esteem.

For example:

“Overall, I like who I am.”

There was no longitudinal research analysis performed on Client A's data. However, for both Client B and Client C, the analysis was performed and revealed a statistically significant improvement of between 9% (Client B) and 11% (Client C). Interestingly, in the Leadership portion of the training, the average of the participant's scores for the self-esteem questions dipped below the level at which they had begun before climbing even higher by the end of Personal Effectiveness. Such an effect might indicate that self-

esteem also dipped along with self-assessment of specific skill levels during the two-thirds mark of the program.

Since the end of the first generation of Boot Camp programs, Tero has continued to collect testimonial data in an attempt to measure the ongoing impact of the training. Some of the comments were the following:

- *“I am grateful to have been given the opportunity to participate in the program. The material has changed the way I view all types of interpersonal interactions. Furthermore, I believe it is changing the culture at [Client Company C] in a positive way, one person at a time. I’ve seen first-hand that Tero’s training procedures produce visible results.”*
- *“I can’t state it enough that I have been lucky enough to go through dozens of training classes in my career, but this session is the best that I have ever attended. Due to the presentation style, content of material and quality of instructors. You can tell that presenting the material is a passion for all the instructors, not just a job.”*
- *“Good program that has helped individuals at [Client Company C].”*
- *“Lots of good information to be learned. Worth being involved with.”*
- *“Great information for business professionals. The communication and presentation skills that can be gained from the program are a big asset for anyone. It is definitely an exciting experience.”*
- *“Whatever pain is experienced by the significant time commitment of the class will be more than made up in the long run, by virtue of having a more effective employee.”*
- *“I believe strongly in the program. I think it shows that [Client Company A] cares about the leadership and development of its employees. Also, it brings co-workers together that may or may not ever get a chance to work together. This is very important in that you learn to work with many different professionals. I feel strongly about what it develops for the individual – speaking and listening skills – among the many skills acquired that will last a lifetime.”*
- *“Very good program for participants to develop confidence in themselves, especially in giving group presentations. It has started to develop a new group of potential leaders within [Client Company A]. Good program. I feel [we at Client Company A] should continue with the concept.”*
- *“Valuable program. Brings employees together, empowers.”*
- *“Training that is prized enough to be considered a perk. If you want to make an impact on the company and yourself, join and lead.”*

7. Research—Description and Results from Second Generation of Boot Camps (2002-2003)

Two of the original Boot Camp clients—Clients A and C—ran a second generation of Boot Camp training in late 2002 and early 2003. Much of the pre-program preparation, program delivery and training philosophy stayed the same from the first generation to the second. However, as a result of the lessons learned from the first generation and in response to requests for further customization, several changes were made in both the curricula and the program research.

Generations one and two were sufficiently different enough to both preclude a clean comparison of the two rounds of classes and their results and to merit a brief explanation of the differences.

One of the chief differences in the second generation of Boot Camps was made because of the questions raised by the analysis of the assessment data in the first generation of programs.

- Could the drop in self-perceived growth in the mid-section of the training be due to the curriculum designed and presented by Tero trainers during that section?
- Could it be due to the impact of the events of September 11th, 2001 on the participants?
- Could it be due to the natural response of humans when they are put under stressful conditions and significant changes are required of them (such as in an intensive development program like Boot Camp)?
- Could it be due to a combination of these factors?

In structuring the second generation of workshops to find the answer to these questions, Tero made some changes.

Naturally, Tero could do little more than hope, as most global citizens did, that events such as those of September 11th would not be repeated.

Tero could, however, make changes to the program curricula. In generation two of the training, Tero did just that. Some (about half) of the curriculum that was presented in the second part of the training (Leadership section) of generation one was delivered in the third part (Personal Effectiveness) in this second generation of workshops. Conversely, some of the Personal Effectiveness curriculum was delivered in the Leadership section. The reasoning was that since some of the greatest growth reported by participants during generation one programs occurred, seemingly, as a result of their experience in the third part of the training, moving this curriculum to the middle part of the program might result in an improvement in the self-perceived growth of the participants during the mid-section of the training.

The result of this change would prove to be one of the great insights on leadership development that Tero observed. The data collected and analyzed in the second generation of Boot Camp programs would clearly show the same pattern of self-perceived growth from the participants as was observed in the first generation of programs.

In the second generation of workshops (as in the first) participants reported significant growth in the first and third parts of the program and a leveling off or drop in the middle section. With the absence of any major events such as that which occurred on September 11th (and even the absence of any more minor events such as corporate restructurings during the mid part of the training) and with the curriculum now ruled out as the explanation for the drop in the mid-section, Tero concluded that the leveling off in self-perceived growth was due to the normal stress that occurs when large changes are required of us. As Tero trainers suspected, and as research on the role of stress in learning would strongly support, Tero had been successful in creating that difficult balance of a stressful enough training program that elicited high performance and growth from the participants, while not too stressful so as to result in burnout. The complete data is explained fully later in this white paper.

Other more minor curriculum changes were also made for the second generation of workshops. Consistent with Tero's mission of innovation in its service to clients, a few of the half-day modules were redesigned to reflect the learning and development of additional skills to support the competencies targeted. These changes continued to support the targeted competencies on the original timeline.

Another main difference was in the assessment instruments used. In recognition of the ongoing development of competencies throughout the training, rather than using three separate measurement instruments in the pre-post, pre-post, pre-post format used in generation one, generation two saw a single, more comprehensive instrument, designed to measure growth in all competencies administered as a pre-, post-, post-, post-assessment. It was hoped that this new format of measurement would capture the longer-term development in the skills introduced. Also, the measurement scale was expanded to allow participants to show growth in smaller increments (the five point scale used in generation one required a self-perceived growth of twenty percent to move up a single point on the scale).

The participant pool of the second generation of Boot Camp programs was slightly smaller than that of the first due to the fact that Client B did not participate in the second round. As a result, the demographics of the participants were slightly different.

Description/Comparison of Participants in Generation Two Programs

Figure 7.1 is an overview depiction of the client companies:

Figure 7.1

	Client A	Client C
Located in Des Moines, IA	X	X
Privately Held	X	
Publicly Traded		X
Agri-business	X	
Aerospace		X
R&D and Production Facilities On-Site	X	X
Training Spear-Headed by HR and President	X	X
Training was Mandatory		X*
Training was Voluntary	X	X*

*Much like the first generation of Boot Camp, Client C's enrollment was a combination of voluntary and mandatory. Many of the applicants were "encouraged" to attend at varying degrees by their supervisors.

The following Figure 7.2 is an overview depiction of the individual participants:

Figure 7.2

	Client A	Client C	Overall Generation 2	Generations 1 and 2
Male	6	18	24	51
Female	8	5	13	39
Caucasian	14	22	36	86
Native American	0	0	0	1
African American	0	1	1	3
Hispanic	0	0	0	0
Supervisory Responsibilities	8	16	24	57
Graduated from Program	14	23	37	84

Gender

The second generation of Boot Camp program participants was made up of 35% women overall which, while significantly lower than the representation of generation one Boot Camp classes was still slightly higher than the national average percentage of women who participate in leadership classes.

The reason for the drop in female participation was that Client B (which was primarily composed of women) did not run a second round of Boot Camp classes at the same time as Clients A and C. Although Clients A and C both increased the number of women in their classes, the Client C class was still primarily composed of males. This is unfortunate but not terribly surprising given that Client C is from an industry (aerospace) not typically populated by women.

Race

The second generation of Boot Camps had even lower representation from minority groups than did the first. Since Tero does not track the reasons that people decide to or are recommended to participate in Boot Camp classes; nor does it track the racial representation of its client companies overall, it is uncertain as to whether the low racial representation is characteristic of the workforce population or a dynamic of the training opportunities.

Supervisory Responsibilities

In the first round of Client A and C's Boot Camp classes, close to half of the participants had existing supervisory responsibilities and half did not. In the second round, over half (65%) had some form leadership or supervisory responsibilities. Given the success of the first program, it is likely that both Clients A and C encouraged participation from people who they want to serve as role models in the future.

Graduation Rate

All thirty-four of the generation two Boot Camp participants graduated from the program which represented a marked increase over generation one (in which 11% did not graduate for a variety of reasons). Tero trainers credit the improvement to their own learning curve. Or in other words, due to what we learned during the first generation of Boot Camp programs, we knew more about what Boot Camp would reasonably require from participants. As a result, Tero trainers made a much more concerted effort to adequately and accurately set the expectations of participants, executives, and mentors.

Second Generation (2002/03) Boot Camp Research Construction

As with the first round of Boot Camps, Tero trainers did have participants fill out "happy sheet" evaluations at the end of every two-day intensive session, but the sheets were used as a form of facilitator feedback rather than useful data about the efficacy of the program.

Assessments—Administration and Construction

The research instrument used to measure the program results was revised significantly for the second generation of Boot Camp classes as a result of input from the professional statisticians who analyzed the data from the first generation and as a result from the changes made to the delivery of the curricula. Tero made two important changes:

- The scale was increased from a five-point scale to a six-point scale to increase the instrument sensitivity and to force a choice (e.g. with a five-point scale, it's too easy for people who are unsure of their answer to simply pick "3" as the middle-of-the-road option).
- The entire set of forty-five questions was administered four times (once as a pre-test and three times as a post-test). The revisions were made to attempt to more

effectively capture longitudinal data and to better match the revisions in course content delivery.

The 45-item assessment contained questions about all eight of the competency areas and related skills, along with self-esteem. For simplicity, as with generation one, labels were assigned to each of the 3 parts of the training (Communication, Leadership, Personal Effectiveness). The following represents the assessment administration schedule:

- Pre-test one (baseline): Early the first day of Part 1
- Post-test one: at the end of Part 1 (Communication)
- Post-test two: at the end of Part 2 (Leadership)
- Post-test three: at the end of Part 3 (Personal Effectiveness)

Much like the assessment instrument from the first round of Boot Camp research, the new assessment contained statements about which participants were asked to select their level of agreement. The level of agreement ranged from (1) “Strongly Disagree” to “Strongly Agree” (6).

For example:

“I make eye contact when I talk to people.”

Strongly Disagree	Disagree	Somewhat Disagree	Somewhat Agree	Agree	Strongly Disagree
1	2	3	4	5	6

The second generation of Boot Camp data was determined to have adequate to high levels of validity and reliability* by Drs. Veale and Westbrook with whom Tero contracted to evaluate the assessments and the data they produced.

Assessments—Round Two Boot Camp Results by Company

The assessments were all administered to the Boot Camp participants over the course of 2002 and early 2003. Only participants who filled out both pre- and post-assessments were included in the research for that specific section of the training.

In the first generation of Boot Camps, the assessment construction made it easy to draw clear connections between the assessment results and the specific sections of the training. For example, the Communication pre-post assessment results only measured the first part

* The reliability varied slightly by pre-post test data as well as by subject matter. For example, the questions for communication skills and personal effectiveness were shown to have higher reliability scores than the leadership questions. However, Drs. Veale and Westbrook also pointed out that the leadership questions were adequately reliable and that there were considerably fewer Leadership questions (8) compared to Communication (13) and Personal Effectiveness (16). Generally, instrument reliability generally improves as the number of questions measuring a given subject increase.

of the training; the Leadership questions only measured the second part and so forth. Only the eight Self-esteem questions were administered in each of the pre-post assessments and therefore only the self-esteem questions could be considered longitudinal data for the generation one research results. However, given that the same 45-item assessment was administered to the Boot Camp participants four times over the course of the entire second generation of Boot Camp training, the questions for all four test areas—Communication, Leadership, Personal Effectiveness and Self-esteem—can all reasonably be considered longitudinal data.

Client A’s (Round Two) Results

Figure 7.3

	Communication	Leadership	Personal Effectiveness	Self-Esteem
Statistically Sig.	50 th to 93 rd	--	50 th to 87 th	50 th to 87 th
Practical Sig.	100.00%	81.80%	83.00%	91.70%

Statistical Significance

Round two of Client A’s Boot Camp program produced better results than did round one. Although the majority of Client A participants showed improvement in the first round of Boot Camp training, only the improvements from final section of the training were statistically significant. In the second round of Client A’s Boot Camp training however, the *majority* of the participants demonstrated improvement in each of the sections of the training and this time, *only* the questions measuring Leadership skills were not statistically significant.

Practical Significance

The majority of Client A participants believed they had improved in all four of the test areas. Much like the round one results, Leadership was the area in which they showed the lowest self-assessed improvement rate with 81.3% indicating that they felt they’d improved (compared to 70% in round one).

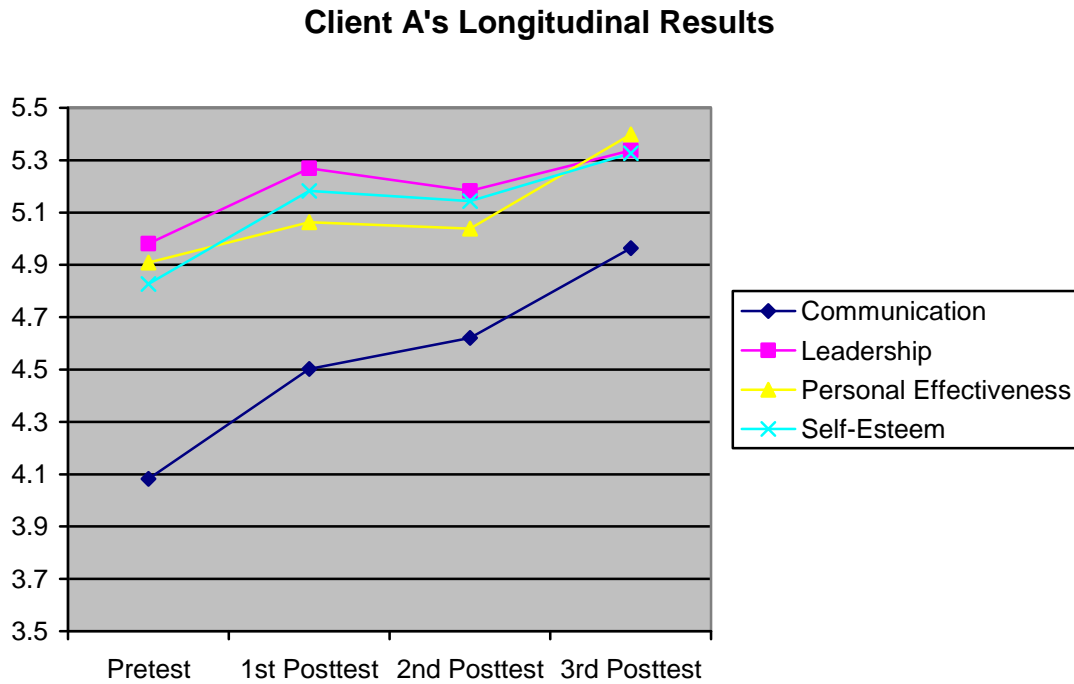
Another way to understand the data is to think of Client A participants as having come into the program with an average assessment of their skills (50th percentile) and then after the program having moved to the 93rd and 87th percentile for communication, personal effectiveness and self-esteem. This represents a statistically significant improvement of 43%, 37% and 37% respectively.

Longitudinal Results

The construction of the round two assessments allowed for better longitudinal analysis. Figure 7.4 below illustrates how Client A’s average results in each of the four test areas changed over the course of the program. Notably, their average Communication scores

start significantly lower than those of the other three areas but, as seen by the improvement trend data, improved the most over the course of the program. The Leadership scores were not statistically significant but started higher than those of the other four areas and showed improvement by the end of the program as well.

Figure 7.4



Of particular note in Figure 7.4 is the similarity of the round two results to those of round one. Despite the fact that the participants a) rated themselves on all four test areas in each of the four testing periods and b) that the curriculum had been revised significantly from the round one classes, their scores show the same pattern of starting high, dipping slightly around the two-thirds mark in the Boot Camp program and then rebounding by the end.

Client C's (Round Two) Results

Figure 7.5

	Communication	Leadership	Personal Effectiveness	Self-Esteem
Statistically Sig.	50 th to 98 th	--	50 th to 87 th	50 th to 83 rd
Practical Sig.	97.70%	72.20%	81.00%	80.00%

Statistical Significance

In round one of their Boot Camp training, only the Communication skills portion of the training demonstrated statistically significant results compared to round two in which only the Leadership portion of the training did not yield statistically significant results.

Moreover, the gains in round two of Client C's results were even higher than those of the first. For example, if participants in both the first and second rounds of the Boot Camp training came into the program with a 50th percentile assessment of their own skills (i.e. average), the first round felt they had improved 40% (to the 90th percentile) compared to the 48% gain in the second round (to the 98th percentile).

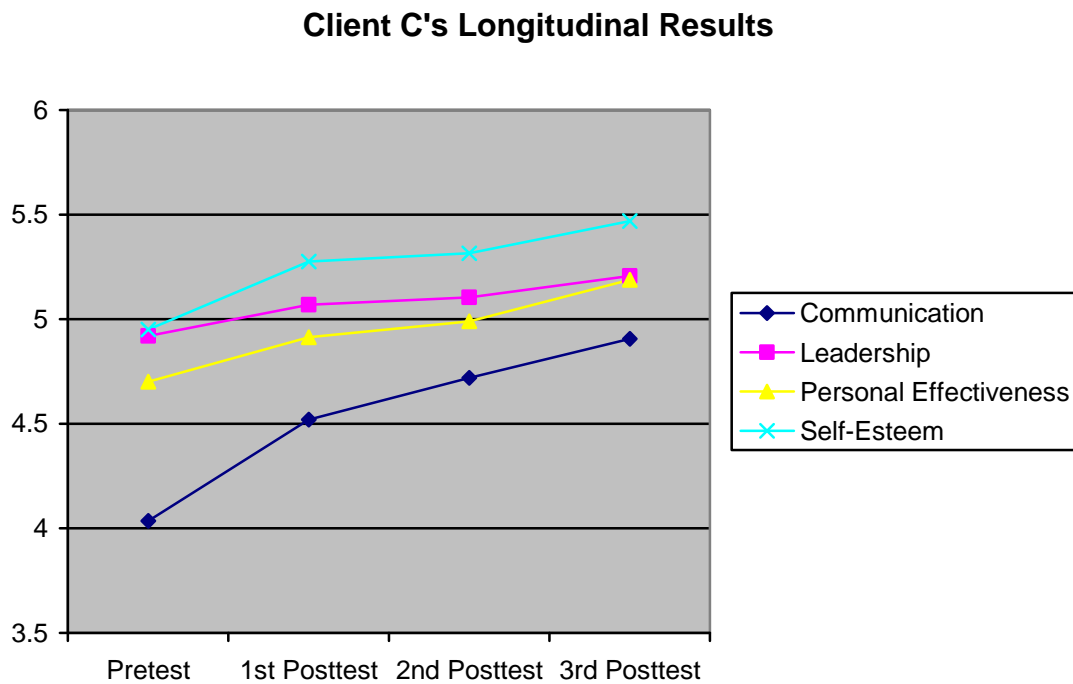
Practical Significance

The majority of Client C's second round participants felt they'd improved in all four areas measured in the training. Much like the first round, the greatest improvements were in the area of Communication and the lowest in Leadership. However, unlike the first round, second round participants perceived their improvements to be higher than did the participants of the first round. For example, in Client C's first round Boot Camp, 88.2% of the participants felt their Communication skills had improved. In the second round, 97.7% felt their Communication skills had improved. The improvements in the other areas of the training (Leadership and Personal Effectiveness) were also higher than those of the first round of training.

Longitudinal Results

As shown in Figure 7.6 below, Client C's round two longitudinal results were similar to Client A's in that scores for Communication started lower than those of the other four test areas but showed the most dramatic growth over the course of the program.

Figure 7.6



The round two Client C participants also demonstrated the same long-term trend of a quick increase in the beginning followed by a plateau and then another increase in the final third of the program with the exception of Communication skills which did not dip in the middle third, but did decrease the incline of its growth trend slightly.

As with the first round of Boot Camp programs, Tero has continued to collect testimonial-type data from its round two client company members. The following statements are from participants, executives, and mentors.

- *“I would recommend the program because it definitely improves your communication with individuals at work and outside of work. This class makes you aware of why we do what we do and why others do what they do and that helps you better understand yourself as well as others to make better decisions for a better and more productive work environment. I have more confidence in everything that I do here at work now. And each project that I do I am always thinking of how I can apply the skills that I have learned to make the project more successful.”*
- *“The program provides an excellent structured approach to teach leadership skills to individuals who have an interest or who have been identified as high potential employees. It happens so often that a company promotes an individual to a supervisory position for which they have had little or no training. The Leaders in Action can at least attempt to bring some of these skills to candidates and provide an opportunity for managers to evaluate certain skills of employees in the Leaders In Action program.”*
- *“The program does help supervisors to remember how important it is to develop and connect with staff. While supervising is not a component of mentoring, many of the mentoring techniques can be used in management. It was a good review of the importance of mentoring in overall company success. Putting time into mentoring benefits both individuals. Brings back some of the human skills in our busy work day.”*
- *“The program creates an environment where people learn many skills within leadership and they also get to know others in the organization that they do not know very well or do not work directly with. The program is strong and well-developed, so offers a wide range of skills. I think employees see the value in this program.”*
- *“The effective Communication section was the most beneficial, but I learned new things from all the sections. Most of what I notice from other team members, is the communication skills coming through.”*
- *“I’ve participated in a lot of continuing education seminars, conferences, etc., and Tero has by far the best one I’ve ever experienced. It kept our attention, presented an enormous amount of information in an interesting and entertaining format, and helped us to grow with encouragement and valuable feedback. I’ve thoroughly enjoyed it.”*

- *“I think the program is valuable and that, without it, many of the participants would not have the skills/self confidence to do group presentations, etc.”*
- *“It is a great program. I was surprised at how many things we learned I could just use right away. I think there are many others at [Client Company A] that could benefit from this training. I would say that the time invested in the program is well worth the sacrifices made to participate. Previous to the Ambassador training, there were areas at [Client Company A] that I thought needed changing and I wasn’t sure what I could do about it, or even if I should ‘get involved’. I’m much more likely today to ‘get involved’ to make a difference.”*

Analysis of the Round Two Research Results

Comparison of Round One and Round Two Results

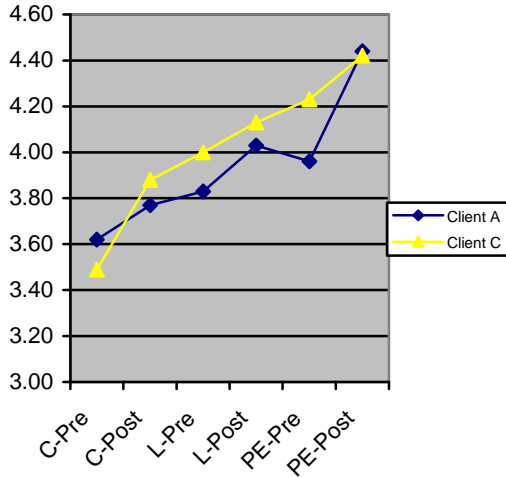
Boot Camps rounds one and two were different in the following important ways:

Boot Camp Round One	Boot Camp Round Two
<ul style="list-style-type: none"> • Three distinct subject areas taught for approximately two months each and beginning with communication skills, then leadership, then personal effectiveness • Three distinct assessments designed to test one subject (e.g. Communication) with 8 self-esteem questions remaining constant. The distinct assessments were administered before and after the specific subject. • Each question contained a 5-point scale. • Leadership projects were assigned at end of the Leadership two-day intensive. • Research results for Clients A, B and C demonstrate a steep increase in scores followed by a drop (at the beginning of the Leadership section of the training) and then climbing higher again (toward the end of the training). 	<ul style="list-style-type: none"> • Boot Camp was still delivered in three sections that started with two full days of training followed by modular sessions. However, the order in which subject matter was delivered was switched around among the different sections. • One 45-item assessment containing questions for each of the four test areas was administered at the beginning of the program and at the end of each section. • Each question contained a 6-point scale. • Leadership projects were still assigned at the end of the Section II, two-day intensive workshop. • Research results for Clients A and C demonstrate a steep increase in scores followed by a drop (or lull) at the beginning of Section II. Scores resume the rate of their climb by the end of the program.

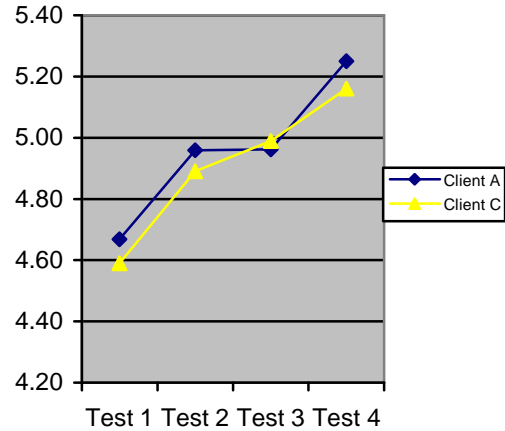
As a result of the above differences in testing methodology and assessment construction, it is difficult to do a proper one-to-one comparison of the research results. However, since the assessment questions themselves were the same from rounds one and two, one can venture a few tentative comparisons. See Figure 7.7 for a comparison of the average scores of Boot Camps rounds one and two.

Figure 7.7

Round One Average Scores



Round Two Average Scores



Both rounds one and two Boot Camp results show the same trend of steady growth over the course of the program. Similarly, in both rounds one and two, Client A participants begin the climb upward in the self-assessment of their skills and then take a quick dive toward the two-thirds mark of the program before climbing even further by the program's end. Both rounds one and two of the Client B participants indicated a smoother climb but do seem to slow their growth incline slightly during the middle portion of the training. It is possible that differences between company cultures might account for the difference in growth trends, but there is no real way to know which cultural differences and/or how they influenced the participant's self-assessments on a daily basis.

What is for sure is that the middle third of the program seems to be characterized by a slight drop in participant self-assessed efficacy regardless of which order the course curricula is delivered and regardless of how the results are measured.

Given the above comparison, it seems that the only connection remaining between the dip and/or lull in the scores is timing of the assignment of the leadership project. This is of particular significance to Tero since Tero trainers have long asserted that leadership development requires real leadership situations in which to practice and that leadership training cannot be accomplished over the short term. It would seem that regardless of the order in which the curricula is delivered, participants experience a period of lowered confidence as they realize the enormity of their task and then (and this is of paramount importance) a renewed sense of confidence as they have the time and support they need to realize that they can act as leaders. In other words, they need the time to gain a sense of mastery. Or as psychologist Todd Maurer describes it...

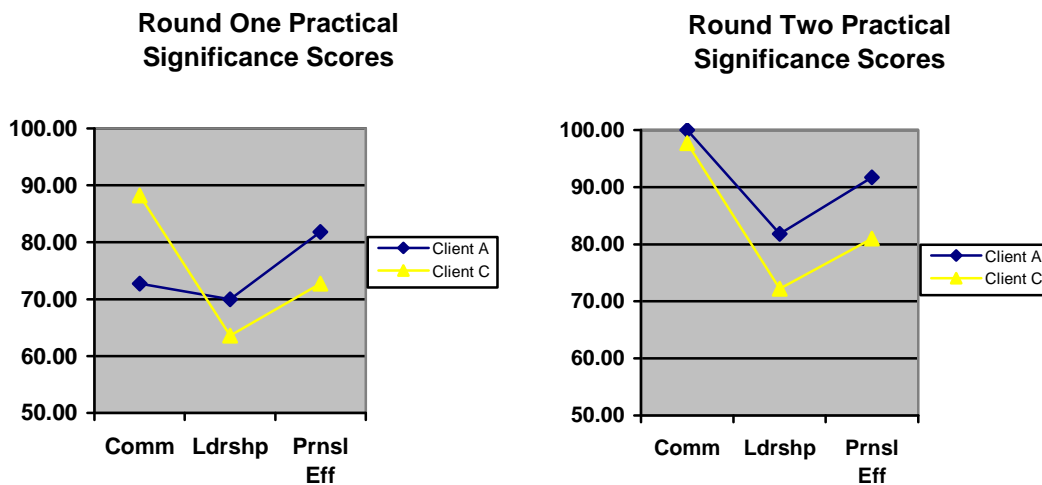
To the extent that a person has had prior experiences in “mastering” the focal task [leadership], this direct experience can be a powerful influence on a person’s judgments about his/her future competence at the task or similar task.³³

To eliminate the leadership project would weaken the program by removing the real-life element and to truncate the program would be to unnecessarily and perhaps irrevocably overwhelm, discourage and burn out the participants.

Comparison of Round One and Round Two Practical Significance Scores

Another interesting comparison between the Boot Camp results of rounds one and two is that of the self-assessed improvements in each of the three subject areas. Figure 7.8 below was calculated by inputting the practical significance percentages from each of the three subjects—Communication, Leadership and Personal Effectiveness—of rounds one and two.

Figure 7.8



Overall, the subject-specific scores of round two were considerably higher than those of round one. What this might mean is that in round two, a higher percentage of the participants from both Clients A and C thought they had improved from the beginning to the end of the program. If so, it might indicate that Tero trainers have learned from their experiences in the first rounds of training and are better able to set expectations and facilitate learning as a result.

One item of continued dismay is the Leadership scores. In round one of Boot Camp, participants from both companies were only asked questions about leadership before and after the delivery of the Leadership curricula in the middle two months of the program. Therefore, when Tero trainers observed the dip of self-assessed improvement in leadership followed by a renewed gain during the Personal Effectiveness curricula, they speculated that it was as much (if not more) a product of the intensive (and often exhausting) learning process—the midpoint of which just happened to correspond with

the delivery of the Leadership curricula. The trainers further speculated that the rise in the percentage of participants who felt they'd improved their personal effectiveness skills might have been clouded by a contribution from the cumulative confidence participants were feeling as they had, by the end of the program, been given more time to practice and experience success in their leadership skills. Or in other words, Tero trainers hypothesized that the slightly lower leadership improvement scores were a product of the *timing* of the Leadership portion of the training rather than a direct reflection of real improvement in skills.

The assessment results of round two, however, suggest that timing may not be the only problem. As previously explained, the administration of the round two assessments was different than that of round one. In round one, there is a direct correlation between the timeframe of the training and subject matter (i.e.: Communication was delivered and measured in the first third of the program; Leadership was delivered and measured in the middle third of the program etc.). In the second round of Boot Camp training, the correlation of subject-matter delivery and measurement is mitigated in two ways: a) the Leadership questions were repeated during all three sections of the training and; b) the delivery of Leadership subject matter was sprinkled into different sections of the training based on client customization needs. And what was the result?

When the answers to the Leadership questions are teased out from among the other subject areas in all three of the round two posttest assessments; Leadership continued to be the subject area with the lowest improvement trends. Even though most of the round two Boot Camp participants (Client A—82% and Client C—71%) felt that their leadership skills had improved by the end of the program, and even though the improvement trends for Leadership had gone up from round one to round two, participants still seem to feel that Leadership is the area of greatest weakness when compared to Communication, Personal Effectiveness and Self-Esteem. Beyond the fact that leadership is an art which requires competence in communication, personal effectiveness, self-esteem *and* leadership-specific skills, (and is therefore less straightforward a set of skills than is communication alone), it is difficult to know exactly why Leadership continues to be the subject with the lowest improvement percentage. The likely culprit is the assessment itself. There were only eight Leadership questions compared to 13 Communication questions and 16 Personal Effectiveness questions. It is commonly known that shorter tests generally have lower reliability coefficients.³⁴ Or in other words, research reliability goes up as the number of questions measuring a specific subject increases.

Tero is also currently undergoing a review of its Leadership curricula and will continue to revise the order in which the Leadership-subject matter is delivered.

8. Comparison of Tero Leadership Program Delivery to that of Other Program Delivery Methods

A joint study conducted by Training Magazine and the AMA found that leadership programs are delivered using classroom instruction 77% of the time. The remaining 23% of the time, delivery relied on computers (8%) or reference materials (15%).²⁴ When asked to further specify the type of training tools they used, the survey respondents said they used the following:²⁴

- | | |
|---|-----|
| • Synchronous Instruction via computer | 11% |
| • Asynchronous Instruction via computer | 21% |
| • Audiotape | 24% |
| • Videotape | 72% |

Of the ninety hours of instruction, the Tero Boot Camp program utilized classroom-based delivery nearly 90% of the time. The 90% was, however heavily composed of active learning activities such as those mentioned in Sections 4 and 8 of this report. The remaining 10% was divided between video tapes (approximately 3% of the time) used to demonstrate a point or show an example of a concept or field trips to another location (about 7%).*

As mentioned before, clients A and C requested an additional segment of training that consisted entirely of intra-company field trips. These field trips were participant-led and seldom conducted in the classroom (Only the “abstract” areas of the company (like Marketing and Accounting) led their fellow participants on imaginary tours of their activities since a real tour of the office spaces would not yield much insight alone). Tero trainers gave the designated tour guides some guidelines but made them ultimately responsible for the delivery of their material.

Intra-company tours composed an additional 20 hours to the already 90-hour program (plus out-of-class work) and were customized additions requested by the clients.

The ninety hours of the Boot Camp program is only half of the program. The remaining portion of time is spent out-of-class and is, so far, an unknown amount of time. The out-of-class work is unknown because a) time spent both with mentors and on leadership projects tended to vary significantly by participants and because b) Tero did not ask participants to keep track of how much time they spent with their mentors or making progress on their projects.

Given the interplay between in-class program delivery and out-of-class program practice, it is difficult to make clean comparisons between the Tero program and other leadership programs. For example, although Tero knows that participants spent between 90 and 120

* Since one of Client A’s round two participants participated via telephone for nearly a half of the program, the percentages noted above do not apply to him.

hours together as a group in some form of facilitated learning (either Tero led or participant led), it is difficult to gauge how much time the participants actually worked on out-of-class assignments related to the program, nor which “delivery methods” they chose during those times. It would be reasonable to posit that the delivery method of choice was “on the job learning.”

After conducting their joint study on leadership programs, the AMA and Training magazine predicted that leadership program delivery will follow the trend of business communication and increasingly utilize online and technology based delivery methods in the future. Training magazine’s Martin Delahoussaye says this means we can “expect to see less live instruction...in favor of the synchronous virtual classroom, or perhaps leadership development prerequisite courses and materials delivered in a self-study, online, environment before the classroom begins.”²⁴

That prediction might be where the comparison between the delivery of Tero’s leadership programs and the charted path of other leadership program ends. Tero will never use computers (online or computer based training) to deliver its leadership program. Until leaders stop leading people and start leading computers, Tero firmly believes that computers will not be the best way to develop leadership skills. Even the best virtual classroom cannot approximate real life with all of its surprising and sometimes annoying variety and unpredictability. In order to learn leadership, potential leaders will have to learn to function within the live and real-time chaos they will have to lead.

Comparison of the Tero Boot Camp Evaluation to That of Other Leadership Programs

In a Training Magazine/AMA study of leadership programs, respondents were asked to rank the leadership program evaluation criteria in order of importance. The following is their response from most important to less important (other criterion like “grades from trainers” were not included in the list below):

1. Job performance evaluation by superiors
2. Program evaluations by participants
3. Job performance evaluation of participants
4. Retention rates among participants
5. Promotions and promotability of participants ²⁴

So how does Tero compare?

- There are several elements of the above list to which Tero, as an external training vendor does not have access such as performance evaluation data (#1 and #3). In upcoming rounds of Boot Camp, however, Tero is planning to incorporate the use of a 360 degree assessment to provide some evaluative data from the participants, their peers and their supervisors.
- As mentioned previously, Tero does collect program evaluation data from participants (#2), but does not include it in its program research because the trainers

feel it is more a commentary on the participant's impressions (i.e. did they enjoy themselves?) than the program's results.

- In round one, Tero's Boot Camp had a 7 percent attrition rate or 6 people out of 90 (#4). In two cases, the participants left the company to pursue another job opportunity. In two others, participants were pulled out of the program to attend to their responsibilities due to business hardship (and per the request of the supervisor) and in the final two, the participants did not engage the material and therefore did not graduate. Tero regrets the last two participants the most. Round two boot camp programs had 100 percent graduation rates.
- In the final evaluative criteria (#5), Tero knows that after the program, 5 of Client A's round one participants were promoted (42%) and another three (25%) were given enhanced responsibilities. Although we don't have exact numbers, informal feedback from Clients B and C has confirmed similar levels of promotion and/or enhanced responsibilities occurred in those organizations.

Perhaps even more telling was Client B's decision to keep the Boot Camp program even in the midst of third and fourth round layoffs. Tero found this to be significant given the fact that HR function and specifically training departments are often the first to get cut during downsizings.

Tero also attempted to use all four of Donald Kirkpatrick's³⁵ levels of training evaluation:

Level 1 Participant reaction: As mentioned Tero trainers collected the smile sheets after the two-day intensive of each segment of training.

Level 2 Learning: Due to the long-term nature of the program, Tero trainers were able to witness the participants' learning curve over time, in videotaped participant presentations and in Action Learning Community discussions. Tero also solicited informal feedback from mentors (although was careful not to induce breaches in confidentiality). Additionally, the assessment questions were a mix of knowledge versus behavior-based questions. An example of one of the knowledge based assessment questions is: "I know how to communicate what I want and need from others."

Level 3 Behavior: An example of a behavior-based assessment question is "I make eye contact when I talk to people." Some of the behaviors were observable on video (e.g. eye contact and body language) and other behaviors were related to Tero by executives during and after the training.

Level 4 Results: One specific way Tero looked for results was through the progress or impact of the leadership project. Since many of the observable/behavioral results occurred outside of class, Tero heard about them from participants, their mentors and the executives.

Level 5 ROI: Some members of the training community have recently added a fifth level of training evaluation to Kirkpatrick's above four levels to represent the return on

training investment. Although Tero did not establish a codified definition of “return” (e.g. confidence, lessons learned, dollars saved or made, productivity enhanced etc.), one way to define investment is the cost of the program.

In a joint American Management Association (AMA) and Training Magazine survey on leadership training, they found that the average per participant cost of leadership training is between \$6,000 and \$7,500. While the level of customization differed from client to client, the average financial investment in the Tero Boot Camp program was just over \$3,000 per person. While it is difficult to know what long-term impact the Boot Camp program will make or what the final effect of the leadership projects will be (many of which are still underway), some of the projects have already more than paid for the entire cost of the program.

9. Lessons Learned and Potential Areas for Growth

Number of Protégés per Mentor

Tero encourages participants to ask executives to be mentors since it often provides informal opportunities for participants to form relationships and gain exposure in the company. However, the demands of executive schedule must be considered. In one case, for example, seven people asked the Vice President of Human Resources to be their mentor. Therefore, although the VP of HR was understandably flattered and genuinely attempted to be available to each of them, the commitment was too much. The seven participants each needed at least an hour (or more) of his time between sessions (generally every two weeks). When added to an already busy schedule and complicated by occasional travel demands; there just wasn't enough time. In round two, Tero strongly discouraged more than one protégé per mentor.

When a client runs the program more than once, Tero also encourages participants to ask former graduates to be their mentor which has worked very well.

Tero is also aware of several potential areas for growth with respect to the research of the Boot Camp program results.

Self-assessment nature of pre-post data

As mentioned, Tero tries to measure the Boot Camp program on the Kirkpatrick training evaluation levels but recognizes that much of the data is self-assessed. Although psychologists such as Albert Bandura have found positive relationships between perceptions of self-efficacy and work-related performance, self-assessment data is not “hard” enough to qualify as rigorous research.³⁶ The research would be improved if a pre-post survey were given to the participant's managers as well as the participants. Or, better yet, if research was tied to the ways in which the participant projects further their company's strategic objectives.

Tero trainers tried to enforce a “measurable” requirement for each of the participant projects so that success or failure could be tied back to hard data. However, the “measurable” rule was enforced somewhat inconsistently in the first round of the program. In round two, Tero did a better job of holding participants to the standard of measuring their progress objectively.

Nonetheless, some of the projects were easier to measure than others. For example:

- A leader from round one of Client C's participant group spear-headed a change in the way accounts were processed and saved the company \$300,000 in the first year. The entire Boot Camp program cost this company approximately \$50,000.
- As a means of attracting and maintaining high-quality employees, a participant from round one of Client A's class created a team to conduct a feasibility study on creating

an on-site daycare for employee's children. The Worldwide president of this company has recommended that this plan proceed to the next phase. If constructed, the building would be the first bi-lingual daycare in the city (and is based in an area of town with high Hispanic population).

- A participant from Client B's group recognized the need to establish a dedicated call center for one of its largest clients as a means of furthering the strategic goal of renown customer service. The call center was organized and established before the end of the program.
- A round one Client A participant initiated a large scale project designed to standardize processes between branch offices spread across every continent so that customer experience is consistently high with each branch.

The above leadership projects are all examples of measurable, observable leadership skills in action. Due to Tero's belief that leadership development begins with the self, it is unlikely that the self-assessment component of program research will ever be fully replaced. However, Tero does recognize the potential problems with exclusively self-assessed research data. After all, good intentions count for something, but not enough. Therefore, Tero is seriously considering the idea of incorporating Kouzes and Posner's 360 degree assessment called "The Leadership Practices Inventory" (LPI) into the Boot Camp program research. The preliminary plans would be to have the Boot Camp participants go through the LPI assessment process as part of the Boot Camp program and then repeat it twelve to eighteen months afterward to get behavioral data on their progress.

Linking assessment data to strategic goals

Tero met with the client representative prior to the launch of the programs to help them identify the top ten strategic objectives. During this exercise, Tero asked the representatives to rate the objectives according to how the company was performing at that time on a 10-point scale.

Those strategic objectives were used as the criteria for the leadership projects (each project had to further one or more of the objectives in order to be eligible for approval). Tero's intention was to meet with the company representatives after the program to review the top ten objectives and re-rate their standing. What happened in a few situations was that company representatives said that the company strategies had changed enough in the six to eight-month period to render the original objectives obsolete. Or, more commonly, scheduling constraints overcame good intentions (e.g. getting executives all back into the same room together at the same time was a lower priority to them once the program was over).

Self-assessment scales

In the first round of Boot Camp programs, the assessments contained a five-point scale. In the second round, the scale was increased to a six-point scale to force a choice and prevent participants from choosing “3” as the middle-of-the-road. However by the second round of research results, participant self-assessment scores were “hitting the ceiling” of the scale and limiting the sensitivity of the instrument. Drs. Veale and Westbrook suggested increasing the scale to a ten-point scale to prevent the ceiling effect, increase the instrument sensitivity and mitigate the middle-of-the-road option.

Control group(s)

Although it is unlikely that the statistically significant increases demonstrated by the Boot Camp program happened as a result of maturation and not as a result of the training, Tero is evaluating the merit and practicality of collecting data from a control group in future generations of the training to evaluate alongside other data collected. To be an effective control group, it would need to be comprised of a peer group who is not influenced by the Boot Camp training. At this point, the trainers are unsure about the viable possibilities of finding a true control group of people who are not a) involved in the training in any way (participating or mentoring); b) at the same level and in the same functions in the company; c) working within the same economic and cultural (both geopolitical and intra-company) contexts and d) not receiving any form of leadership training themselves.

10. Conclusions

This paper began with the questions: Why leadership? And, what is the best way to develop leadership?

Why leadership development?

During times of uncertainty and change, people look to leaders to show them the way, reassure them that all will be well and show them how to get involved and help. These are times of great uncertainty and change and leadership has become even more important as the daily news seethes with stories of economic, political and corporate turmoil. Add to that the recent Development Dimensions International (DDI) research results indicating that by 2005, one in five top management jobs and one in four middle management jobs will be empty due to vacancies left by the retiring Baby Boomer cohort.³⁷ This means that the leaders we have are leaving and there had better be replacements to take the helm or the world in general and the corporate world in specific is going to be in trouble.

DDI's CEO and Co-founder William Byham and co-writer Richard Wellins suggest that one solution to the impending leadership draught is, in essence, to grow your own. The wisdom of the notion of home-grown leadership incorporates the ability to develop the capabilities of leaders within the context in which they will be used. Leaders grown within their own companies will (or should) have a broad understanding of the company, how its pieces fit together to form the whole and, how changes in one piece affects the performance of the others. They will also be familiar enough with the corporate culture to know what to protect and preserve and what to question and/or revise.

What is the best way to develop leaders?

The preliminary results of research on Tero's Boot Camp program indicate that the program is working. Participants of the program are leaving with a verified higher sense of self-esteem, greater confidence in their communication and interpersonal skills, AND, most importantly, an experience of taking leadership with the support of a veteran mentor.

Plus, if on top of all that, one of the participant's leadership project produced a return of six times the cost of the entire leadership program within the first year, is that a good investment?

The answer to the question: What is the best way to develop leaders is therefore simple, but not easy.

- The best way to develop leaders is to stick with it long enough to get past the uncomfortable stage of unknowing to the more optimistic upswing of small wins and renewed optimism.

- The best way to develop leaders requires a balance between a safe learning environment and the real world so the leaders-in-training have the dual luxuries of being able to learn through real success (and/or failure) within the supportive community that will help them learn from their experiences and ask them to try again...and again.
- The best way to develop leaders is to teach them the general things you can—like communication skills, hold them accountable for the practice of those skills, but let them learn on their own what you cannot teach them (e.g. how to apply the communication skills in that particular corporate culture or team setting). Provide lots of opportunities to get feedback on the individual learning moments so they can digest what they are learning on their own with others who are speaking the common language of the program.
- The best way to develop leaders is to make them lead *without* removing some of the wild cards (like people) from the equation. How else will they learn to inspire people with a vision? Resolve conflicting interests? Bring out the best in others?
- The best way to develop leaders is to engage the community in which they are learning. The leaders-in-training may be unique individuals whose leadership styles should fit their contexts, but they are not the first people to face common leadership dilemmas and should be given the opportunity to learn from others who have gone before them. Moreover, a mentor not only helps the leader learn, s/he has a natural vested interest in the success of the leadership program and often learns some new perspectives and skills as a result.

In short, the best way to develop leaders is to toss them in the deep end, leave them in there until after they've stopped shouting and started swimming. Make sure there are plenty of coaches and life-guards around to monitor their progress. Stress them out by making them practice. Help them debrief their experiences. Ask them to take risks, produce real results and to try again when they fail.

Notes and Bibliography

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¹⁷ Brenda Sugrue, "2003 State of the Industry," ASTD's Annual Review of U.S. and International Trends in Workplace Learning and Performance.

¹⁸ Lt. Col. Dave Grossman. "It's time to stop training our kids to kill." U.S. Catholic. June 1999. pp 24 and ff. This is a troubling article written by an U.S. Military expert who spent nearly 25 years as an army infantry officer and a psychologist learning and studying how to enable people to kill. He describes this field as "killology" or the study of killing. In the article, he notes that the kill-rate in the early wars (civil and WWI) were very low (15-20% in WWI) and says that within the midbrain, there is a natural resistance (for untrained people) to killing a fellow human. Mr. Grossman describes how the military systematically revised its training techniques to condition its soldiers to the environment of war so that they don't have to pause to think when they are in that setting, they just shoot. An example is that in WWII firing range training sessions, soldiers shot at bull's eye targets. Now, they shoot at realistic, man-shaped silhouettes that pop up in their field of view and then drop. The thesis, per the title of the article, is that parents are unwittingly allowing their kids to be desensitized in precisely the same way in a culture of violence mixed with entertainment—without the safeguards.

¹⁹ Ronald A Heifetz, *Leadership Without Easy Answers*. Belknap Press of Harvard University Press, 1994.

²⁰ Dana Gaines Robinson and James C Robinson, *Performance Consulting: Moving Beyond Training*, Berrett-Koehler, 1996.

²¹ Sherron, Gene T. and Boettcher, Judith V. *Distance Learning: The Shift to Interactivity*, Vol 17, Cause Professional Paper Series, 1997

²² Research study on time needed to learn a complex set of skills presented at 2003 International Conference and Exposition for the American Society of Training and Development (ASTD). Sources cited were the Center for Creative Leadership and the Gallup Organization.

²³ In Thomas Stewart's, *Intellectual Capital: The New Wealth of Organizations*, Doubleday Currency, 1997, he says, "...in the age of intellectual capital, the most

valuable parts of those jobs have become the most essentially human task: sensing, judging, creating, building relationships...” pg. 51.

²⁴ James Kouzes and Barry Posner, *Credibility: How Leaders Gain and Lose It, Why People Demand It*. Jossey-Bass, 1993. In a co-sponsored survey with the AMA, Kouzes and Posner asked 1500 managers from all over the nation to rank a list of qualities based on what they were looking for in a leader. 87% wanted “honesty,” 67% wanted “competence,” 62% wanted “forward-looking,” and 58% wanted “inspiring.”

²⁵ Kenneth Blanchard and Paul Hersey adapted their Situational Leadership model from the Managerial Grid by Robert Blake and Jane Mouton’s ¹³in the 1960s. Since then, they have gone separate ways and each claims a version of the Situational Leadership model (Blanchard’s—the SLII is revised very slightly). Look for further information in Paul Hersey’s *The Situational Leaders*, 1984 or Blanchard, Zigarmi and Zigarmi’s *Leadership and the One Minute Manager*, 1985.

²⁶ Noel Tichy and Eli Cohen, *The Leadership Engine*, HarperBusiness, 1997.

²⁷ Charles Fishman, “Few can do it, few can sustain it, few can survive it.” *Fast Company*, 1997.

²⁸ Jack Zenger, David Ulrich and Norm Smallwood, “The New Leadership Development,” *Training and Development*. March 2000, pp 22 and ff.

²⁹ Jon Katzenbach and Douglas Smith, *The Wisdom of Teams: Creating the High Performance Organization*. HarperBusiness, 1993.

³⁰ Martin Delahoussaye, “Leadership in the 21st Century,” *Training*, August 2001, 38, 8, pgs. 60 and ff.

³¹ US Census 2000 data online at www.census.gov

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³⁴ R. DeVellis, *Scale Development: Theory and Applications*. Thousand Oaks, CA: Sage Publications. 2003.

³⁵ Donald Kirkpatrick’s four levels of training evaluation, 1979.

³⁶ Albert Bandura, *Self-Efficacy: The Exercise of Control*. W.H. Freeman, 1997.

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