MS-831: Jack, Joseph and Morton Mandel Foundation Records, 1980–2008.
Series D: Adam Gamoran Papers. 1991–2008.
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JEWEL: North American Center for Jewish Educational Leadership. Bacon, Terry. "JEWEL Leadership Scan for Business", July 1998.

For more information on this collection, please see the finding aid on the American Jewish Archives website.

MEMORANDUM

TO: KAREN BARTH
        GAIL DORPH
        SARAH FEINBERG
        CIPPI HARTE
        ELIE HOLZER
        BARRY HOLTZ
        KAREN JACOBSON
        NESSA RAPOPORT
        LEAH STRIGLER
        PEARL BECK
        ✓ADAM GAMORAN
        ELLEN GOLDRING
        ALAN HOFFMANN
        LISA MALIK
        DAN PEKARSKY
        SUSAN STODOLSKY

FROM: JESSICA HOLSTEIN

SUBJECT: JEWEL SCAN ATTACHED

DATE: JULY 28, 1998

As promised, attached please find the one remaining scan of leadership development for JEWEL:

- Business sector – Terry Bacon

You have already received copies of the other scans:

- Education - Mike Milstein

- Volunteer boards - Nancy Axelrod

- Not-for-profit world by Dennis Young.

JEWEL Leadership Scan for Business

Dr. Terry Bacon

Scan of Programs

Leadership development in business *is* big business. In 1997, U.S. corporations spent more than $45 billion on management and leadership development, an increase of $10 billion annually from a decade ago. Of this $45 billion, corporations spent about $12 billion educating their senior executives in leadership. In total, major corporations like General Electric, AT&T, Microsoft, Motorola, and Intel each train about one thousand managers a year in the knowledge, skills, and behaviors of effective leadership and management. When you factor in the cost of the time executives spend in leadership training, the annual investment that business and industry make in leadership development easily exceeds $100 billion.

In business, leadership development is not motivated by altruism or by the humanistic ideals of a liberal education. Rather it is driven by the need to thrive in a highly competitive and increasingly global marketplace. To prevail, corporations are compelled to optimize every aspect of their operations, including their leadership. The evidence that leadership can have a significant impact on a corporation's performance is clear in Roberto Goizueta's leadership at Coca-Cola, Lou Gerstner's leadership at IBM, and Jack Welch's leadership at General Electric. In each case, the total market value of the corporations these men led increased dramatically after they assumed command.

Indeed, leadership is considered so important that many corporations have created their own corporate universities to develop the leadership of their high-potential employees. Shell created such a program in 1993 even though it was outperforming every other energy company in the world. When companies are struggling, as Kodak is today, the reason cited most frequently is a leadership failure. Finally, in a study of executive derailment sponsored by the Center for Creative Leadership, researchers learned that the most frequent reason for executive failure was poor leadership and interpersonal skills.

Current Trends in Leadership Preparation and Development

Today, there are five major schools of thought on the preparation and development of business leaders. I will refer to these approaches as (1) skill and trait study, as exemplified by Harvard's Advanced Management Program; (2) kinesthetic learning and personal challenge, as practiced by Outward Bound; (3) action learning, which was developed at General Electric's Crotonville center; (4) assessment, feedback, and simulation, which is represented by Lore International Institute's customized programs and to some extent by the Center for Creative Leadership; and (5) self-study, coaching, and mentoring, which is practiced in many corporations and is exemplified by private executive coaches and counselors.

Skill and trait study—This approach reflects the traditional, academic study of the competencies needed to perform the tasks of leadership and management. It evolved from the classic studies of great leaders and assumes that leadership can be learned by studying and then emulating the traits and best practices of past leaders or institutions known for their leadership effectiveness, including political, religious, social, and

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military leaders. Leadership development programs based on this approach sometimes use historical texts like Sun Tzu's *The Art of War* and Machiavelli's *The Prince* as primary sources.

This school of thought also assumes that one becomes a better business leader by mastering the technical aspects of business management, such as finance, marketing, operations management, and quality improvement. Consequently, most of the current practitioners of this approach are the business schools in large universities: Stanford Business School, University of Chicago School of Business, The Wharton School (University of Pennsylvania), Sloan School of Management (MIT), and Harvard. All offer week-long or months-long programs for executives designed to improve their business leadership by immersing them in case study-based discussions of various business problems. The goals of these programs are to enrich the participants' understanding of business leadership issues and, to a limited extent, to build skills in certain key areas of business management.

On the plus side, these programs enable visiting executives to discuss leadership issues with their contemporaries, and the case study method can stimulate thought-provoking discussions of real business problems. On the negative side, (1) the programs are mainly delivered by academics who, although accomplished in their fields of study, are not practicing business leaders and have, at best, an arm's length understanding of leadership in business; (2) most of these programs are too short to have significant, lasting impact; and (3) the evidence suggests that the *cognitive* study of leadership has little impact on people's actual leadership capabilities. In short, *discussing* leadership does not make one a better leader.

The curriculum focuses on business issues but often includes such topics as succession planning, motivating people, leading innovation, and developing other leaders. The class methods are primarily lecture and small group discussion of case studies and problems. The participants are recruited primarily through mass mailings of brochures and program catalogs. Because the participants are practicing executives, there are few other functions connected to the programs, such as placement. In fact, this is true of the vast majority of business leadership programs.

Kinesthetic learning and personal challenge—At the other end of the spectrum are the so-called "ropes courses" delivered by such groups as Outward Bound and the Pecos River Learning Center. Like the academic programs, these outdoors courses are offered as open enrollment programs (open to anyone) in a variety of settings. Outward Bound's programs are designed to "inspire respect for self, care for others, responsibility to the community, and sensitivity to the environment." Their primary assumption is that the experiences people have in challenging environments and activities, such as white-water rafting, mountain climbing, and desert survival, help them learn the skills in decision making, risk taking, and problem solving they need back in life and at work.

In the longest of these programs, participants are immersed in an eight-day outdoor excursion into the wilderness where they learn survival skills, are physically challenged by demanding tasks (such as rappelling from a cliff or crossing a chasm on a rope bridge), and participate in individual and group problem solving and decision making. The goals of such programs are to instill confidence in people's abilities to master the challenges and to motivate them to take more risks. The shortest versions of these programs are day-long outdoor activities for small teams that include creative

problem solving (e.g., teams creating complex geometric figures with ropes while blindfolded) and group challenges, such as climbing tall walls without aids.

Through personal challenges, programs like Outward Bound hope to give participants a heightened sense of self, the capacity to persevere, and the courage to overcome their own reluctance. They also hope to instill greater respect for the natural environment and the sense that leaders are stewards of their environment, the institutions they serve, and themselves. The ideal outcome is a transformed self, and this no doubt occurs for some people. However, there is widespread belief in the business community that the link between wilderness survival experiences and business leadership is tenuous at best, and many people who have gone through such programs see little connection between their day-to-day leadership challenges and their wilderness experience—though they recall the event fondly.

Action learning—One of the latest trends in leadership development is action learning, which was developed by Noel Tichy at the University of Michigan in cooperation with General Electric's management and leadership development center in Crotonville, NY. A number of corporations have adopted it as a model of executive development. In a typical action learning program, a group of mid-level executives is divided into teams and the teams are given the responsibility for solving a real—and difficult—business problem.

During the action learning period, which can last for one to six months, the learners immerse themselves in the problem; receive instruction in problem solving, leadership, decision making, and business analysis from business school professors or corporate mentors; and gather and analyze real data on the problem. At the conclusion of

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their action learning program, they must present their solution to the corporation's top executives. Their assumptions, analysis, and conclusions receive thorough scrutiny.

Without question, action learning is extremely effective at developing better business thinkers, analysts, and leaders—in part because of the remarkable commitment participants and their institutions make to the learning process. There is no set curriculum; participants ask for and receive whatever training and guidance they need to solve the problem. So these programs have the virtue of being customized for every team of participants. Clearly, this approach requires an extraordinary investment from the corporation sponsoring it, so the participants are typically selected from the group of mid-level executives who are considered to have the highest potential for advancement and contribution to the firm.

Assessment and simulation—Another of the current trends in business leadership development is the use of 360-degree feedback assessments and simulations. Two exemplary practitioners are the Center for Creative Leadership (CCL) and Lore International Institute. Both institutions assume that leadership is contextual and personal, that people can't learn to become better leaders in the abstract. In assessment and simulation programs, the emphasis is on the individual leader, and the goals are to help each person maximize his or her leadership potential.

This school of thought emphasizes assessment and feedback as a means of developing greater self-knowledge. Leaders who are aware of their strengths and weaknesses are better able to capitalize on their strengths and mitigate or work around their shortcomings. Also, because leaders lead through the consent of their followers, it's helpful for leaders to know how their followers perceive them. So this school uses 360-

degree leadership assessments, which provide feedback to leaders from their boss, peers, subordinates or followers, and sometimes clients. These assessments, such as the *Lore Leadership Assessment* and CCL's *Benchmarks*, are based on researched models of business leadership and offer program participants a comprehensive view of themselves as leaders.

During the training program, participants experience leadership problems and challenges through case-study-based role play exercises, usually in small teams. In Lore's customized programs, the case studies are tailored to the participants, so they are enacting the kinds of situations they encounter in real life, and they receive continuous feedback on their performance.

Programs like these have two key goals: (1) to help participants assess themselves as leaders by showing them how they and others evaluated their skills using a validated model of leadership and (2) to help them build their leadership skills through experiential learning situations that are as close to reality as the program designers can get. Such programs can be for entry-level leaders or for more experienced leaders. The curricula are variable. For example, CCL offers some standard open-enrollment leadership programs with a fixed curriculum, which is described later. Lore develops customized leadership programs for clients, so the design and structure of each program differ based on the client's and the participant's program needs. CCL's open-enrollment program participants are recruited through direct mail brochures; Lore's customized programs are typically provided to specific corporations, which recruit or select participants based on the training needs identified in each unit of the corporation.

Self-study, coaching, and mentoring—Finally, a number of corporations use some form of self-study plus coaching and mentoring to develop their leaders. The prevailing attitude in most businesses is that business leaders are built largely through experience. Education and training play an important role, but there is no substitute for the experience gained as executives complete a variety of different assignments and learn the business by performing in different functions. In the course of an early career, a developing business leader will usually act as a team leader, project manager, functional manager, and perhaps regional manager. Each different assignment presents new challenges, increases in the scope of responsibility, and the need to learn how different functions operate and how they all work together.

An essential part of this learning process is self-study and personalized guidance through coaches and mentors. Coaching is considered so important that many organizations formalize the relationship. In McKinsey & Company, for instance, every professional has a development group leader (DGL) who is responsible for helping the professional shape his or her career and choices of assignment. In many parts of General Electric, up-and-coming professionals are assigned mentors, who meet with them regularly and providing coaching and other developmental assistance. Motorola carries the process further. They've created an Application Consulting Team that follows trainees back into the workplace and helps them apply what they've learned.

The principal goal of coaching and mentoring programs is to provide individualized assistance to developing business leaders from people who have already come up through the ranks and learned the lessons. In the more formal programs, such as General Electric's, candidates are selected from the large pool of lower- and middle-level

executives and professionals. In some companies, such as Fluor Daniel and Brown & Root, the candidates for special attention are selected based on their designation as "high potentials." High potentials in these companies move on a fast track through the training and development cycle and usually receive personal attention from the CEO and other senior executives.

Past Trends in Leadership Preparation and Development

Leadership programs in business have traditionally been rooted in business skills, such as finance and marketing. Many were appropriately called "mini-MBA" programs because they sought to give participants the skills and analytical tools that students typically receive in an MBA (Masters of Business Administration) program. In the past five years, however, there has been a glut of MBA graduates from the nation's business schools, and companies have recognized that business education is not leadership education. Having business skill is a prerequisite for business leadership because it lays the technical foundation for the kinds of problems business leaders must solve. However, business skill alone is not a sufficient criterion for business leadership.

There's perhaps no better evidence of the movement away from mini-MBA programs than the changes in Harvard's Advanced Management Program, which is the leading business school program for executives. In 1987, one-third of the participants in this program were non-U.S. residents; today, two-thirds are non-U.S. residents, and that percentage is growing. As other, less-developed countries send their developing leaders to Harvard and other business school executive programs, U.S. firms are increasingly relying on action learning and assessment/simulation programs to develop their leaders.

Today, the prevailing perspective is that business leaders must develop *in situ*—that the benefits of diverse leadership experiences, combined with feedback, are more powerful than abstract discussions of leadership traits or academic knowledge of leadership skills. The leader in the field, making sound business decisions and leading teams and units effectively, is the best teacher of those who aspire to become strong business leaders, and the best experience for those developing leaders is trial by fire.

Consequently, one of the trends in the past five years has been for senior executives in companies to play an active role in leadership development. In Intel Corporation, for example, all executives are expected to devote some time to training and development. Until he retired, Intel CEO Andy Grove taught several courses each year and was an active coach for a number of more junior executives. Jack Welch continues to teach classes at GE's Crotonville campus. He claims that it's one of the most fulfilling parts of his job. Although executive participation in leadership programs is by no means universal in the business world, it has been one key trend in recent years.

Future Directions in the Field of Business Leadership Development

In the future, leadership development in business is likely to move in these directions:

1. *The distinction between leadership and management will become more important.* A number of authors, notably Harvard's John Kotter, have identified the differences between leadership and management, but this distinction is not always clear in leadership development programs. However, the movement away from strongly hierarchical organizations is likely to increase the need for leadership at all levels, where people must act and

accomplish their goals without the mantle of authority. The growing empowerment of the workforce and delayering of organizations will mean that more future leaders will have to operate without managerial prerogatives, so leadership without authority will grow in importance.

2. ***Leadership development will move away from the classroom.*** Programs will increasingly focus on learning through action, and classroom time will be devoted to small team work, case study discussions, role play exercises, simulations, and presentations. Lectures by authorities will play an increasingly smaller role and will perhaps vanish altogether in some programs. The emphasis will shift, as it has already in a number of programs, to self-conscious *learning by doing*. Participants will be expected to act like leaders and will receive feedback and coaching based on their performance. Further, leadership programs are likely to become more boundaryless, which means that it won't always be clear when the program's in session and when it's not, where the program is taking place and where it isn't. Instead, programs will become more integrated into the participant's daily work life, and learning and teaching will take place continuously.

3. ***Technical skills will remain important, but the emphasis will shift to leadership skills.*** Increasingly, programs will recognize that possessing good business skills is a necessary but insufficient condition for good leadership. Future leadership programs will likely differentiate between the two and as program designers become more comfortable with pure leadership development, they will probably deliver the skill sets separately. In other

words, there will be mini-MBA or business skill programs that aspire to teach business skills rather than leadership. And there will be leadership programs that assume that participants already have the business skills and thus focus on their leadership skills. Pure leadership programs will become increasingly experiential as program designers concentrate on the "soft skills" of leadership, which can be learned and improved only through the enacting and reenacting of those skills.

4. ***The commitment to lifelong learning will grow***. Leadership program directors have long recognized that there are no quick fixes for leadership problems and that leadership development is a decades-long endeavor. However, the programs in place have not always reflected this perspective. Until recently, most companies offered discrete 2- to 3-day programs on leadership and did not track a leader's development through the long term. The most advanced organizations are now viewing leadership development as a lifelong learning process. At Motorola University and GE Crotonville, programs are in place to guide developing leaders at various points in their careers. Perhaps the most advanced is McKinsey & Company's leadership curriculum, which begins with an Introductory Leadership Program for new hires and includes a series of programs at various points along a consultant's tenure, culminating in a highly advanced Client Leadership Workshop. The growing view is that leadership development is never finished and that the best business leaders are continuous, lifelong learners.

5. ***Leadership development will become more integrated into human resource management functions***. Finally, leadership training will be integrated into other human resource functions as corporations recognize the value of managing the total human resource. Specifically, training and education will be an outgrowth of the performance management system, which includes career planning, goal setting, performance appraisal, compensation management, and training. In the future, assignments and goals are likely to be based on an executive's performance appraisal and will reflect 360-degree feedback on various aspects of his/her performance, including leadership. Executives will have specific development needs identified and addressed through a variety of training and development interventions, and overseeing their development will be their formally designated mentors and coaches. This kind of integrated development system exists in some organizations today, but most corporations have not yet achieved full integration of these human resource and leadership development functions.

Best Practices in Business Leadership Development

Successful Program Approaches

A successful leadership development program in business is one that has a significant impact on participants' leadership knowledge and skills. That impact should be evident in improved organizational performance, so there should be a measurable gain in the performance of each group or unit a participant leads after he/she has completed

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the development program. To accomplish these results, successful programs generally have the following characteristics:

1. *They reflect and reinforce the organization's business strategies and culture.* In successful programs, the course purpose, design, methods, and content are aligned with the sponsoring organization's goals, needs, business strategies, and culture. The program is viewed as an instrument of strategy, so every aspect of it reflects the leadership needs of the corporation. For instance, a start-up high-tech company would need a leadership development program that fostered entrepreneurial leadership, and the content would include leading innovation, motivating technical people, and managing rapid growth. However, a stable consumer goods corporation like Johnson & Johnson would need a program that focused on motivating an existing workforce, improving quality and customer service, and managing globalization. In business leadership development, one size does not fit all. Successful programs help achieve the corporation's strategic goals and are very specific to each different corporation's needs and culture.

2. *They result in long-term retention of knowledge and skills.* Successful programs are designed for lasting personal and organizational impact. They use methodologies like 360-degree feedback, intense role plays, public performances, and challenging case studies to enhance learning and personal change. Consequently, the most successful programs are not easy for participants. They might include a golfing break midweek, but the rest of the event is intensive and exhausting.

3. *They permit individual, real-time customization.* The difference between computer skills training and leadership training is that in the former each participant needs to learn the same thing. In leadership training, every participant has different needs, so the most successful programs allow individual, real-time customization of the program. Each participant should have a personal development plan that is identified early in the program, is shaped by the program's events, and allows participants to modify exercises so their particular needs are addressed each time. Obviously, this kind of design requires flexibility and constant focus on what participants are learning and what they still need to learn.

4. *They build self-knowledge and are feedback intensive.* Leadership is a situationally-based exercise of a leader's knowledge, power base, technical and interpersonal skills, and personality, so the most successful programs are intensely personal and illuminating. They build the developing leader's awareness of his/her leadership style and effectiveness through 360-degree assessments and a feedback-rich environment during exercises and simulations. Generally, the more extensive the feedback, the greater the learning, although feedback can reach a point of diminishing returns. So the best programs balance feedback with other types of learning activities that are less self-focused.

5. *They have direct application to real-world business leadership problems and challenges.* The best programs are not abstract exercises in leadership; the applications to the participants' real-world leadership issues are immediate

and apparent. Generally speaking, the more the participants have to deduce how the program's learnings apply to them, the less effective the program is. To remove any doubt, the most successful programs are either based on their real-life work problems and challenges or are conducted within their actual environment (e.g., the action learning programs described earlier).

6. ***They include reinforcement after the program and are part of a long-term development plan.*** Finally, the most successful programs do not end. They include mechanisms for reinforcement of the learnings and follow-up for participants. Further, they are part of the participants' long-term development plan, which typically will include further education and training as well as work experiences and coaching and mentoring.

Three Exemplary Programs

The three exemplary programs cited below reflect the range of leadership development programs available to executives and other business professionals.

Center for Creative Leadership (CCL)

The flagship program for CCL is the Leadership Development Program (LDP). Now over twenty years old and delivered at twelve sites worldwide, this program has stood the test of time and has proven to be applicable in a broad range of business and industrial organizations. Its objectives are to build self-confidence, increase motivation and the ability to set and achieve organizational goals, stimulate personal and career growth through self-directed development, and improve management skills by identifying strengths and weaknesses as perceived by others.

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The program lasts six days and includes a variety of self-assessments and 360-degree leadership and personality surveys. It also features two types of post-program feedback: a self-assessment of progress three months later and an assessment by the participants' colleagues on their ability to meet post-program developmental goals. During the program, participants meet with a psychologist counselor for several hours to review their individual feedback and reflect on their development needs and goals. They also work in small teams with some of their peers and give and receive feedback to those peers late in the program.

The program's agenda is as follows:

Day 1 Introduction to the program; group and individual assessment activities

Day 2 The dynamic context of leadership in organizations; performance development (situational leadership and management)

Day 3 Decision making and effective team building

Day 4 Enhancing the learning process; looking at life experiences as patterns of learning; how participants themselves learn in different circumstances

Day 5 One-on-one staff feedback; peer feedback

Day 6 Goal setting and developing individual leadership effectiveness after the program; evaluation and closing

The LDP's most unique feature is its extensive battery of pre-program assessments and the hours spent in one-on-one feedback with a counselor. The program is also unique in that it includes numerous simulations and other small-team activities (although it has no role plays). It is one of the best programs for stimulating participants' assessments of themselves as leaders. However, the lecture/discussion

format of some of the program segments is not exceptional, and the quality of each program depends on the effectiveness of the faculty delivering each program segment. Nonetheless, the LDP is considered to be an exemplary program of its type: an uncustomized, open-enrollment leadership course. CCL has a strong business focus and is well regarded as a nonprofit, research-based institution.

The LDP is offered in a variety of locations, including Greensboro; Colorado Springs; San Diego; St. Petersburg, Florida; San Antonio; College Park, Maryland; Hartford; Niagara-on-the-Lake, Ontario; Brussels; Berkhamsted, England; Mexico City; and Mt. Eliza, Australia. The program cost is $5,100 per participant. For further information, contact CCL at 336-545-2810.

Harvard University

Harvard Business School offers a number of programs in general management and leadership and is one of the leading academic institutions that provides leadership development education for business people. One of their more unique leadership programs is entitled Leadership in Professional Service Firms (LPSF), a one-week course that focuses on a specific application of business leadership and is therefore more useful than most general business school leadership courses.

The LPSF, like all Harvard programs, makes extensive use of the case study method. Participants are assigned to small case-study teams and work intensively through the program reading and discussing cases and learning about leadership from immersion in the case study problems. Interacting with peers during case study

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discussions and problem solving is considered to be one of the highlights of the program.

The LPSF explores a number of issues regarding leadership in professional service firms:

- Balancing personal management responsibility with professional activities
- Developing an effective firm strategy
- Marketing the firm's services
- Maintaining and building client relationships
- Developing new products and practice areas
- Developing the capabilities of professionals
- Motivating and sustaining a highly skilled professional staff
- Controlling quality and costs to improve profitability
- Managing firm growth domestically and internationally
- Building the firm's culture

As the program content indicates, the LPSF is heavily focused on building technical business skills. During the week, participants read cases, discuss the cases in small teams, give case study presentations, and attend lectures on the above topics by the Harvard Business School (HBS) faculty. What makes the program so powerful is the very high quality of the faculty. HBS is extraordinarily active in research and publishing on business topics. The *Harvard Business Review* is one of the nation's leading journals on business thought, and the faculty at the LPSF includes professors who have published extensively in their fields. So attending the LPSF can be an enriching experience for business leaders in professional service

firms. It permits the kind of reflection and introspection that most business leaders rarely have time for, and the lectures and faculty-led discussions are thought provoking and illuminating.

The LPSF is an open-enrollment program, but enrollment is limited. Harvard accepts applications over its web site and also advertises through direct mail. The preferred applicants are leaders in large and middle-sized firms, and the firms must sponsor the program participants. The fees are $6,000 (winter) and $6,300 (summer) and include tuition, books and case materials, accommodations, and most meals. For further information, contact Harvard Business School's Executive Education department at (617) 495-6226.

Lore International Institute

Lore International Institute is a worldwide training and education firm that offers customized programs in leadership development. It has no standard programs because all are modified for the sponsoring organization. An example of one of Lore's leadership programs is the Client Leadership Workshop (CLW) it developed with and for one of the world's leading management and business consulting firms.

The CLW is a six-day intensive program for mid- to senior-level professionals. What makes it unique is its highly experiential design and emphasis on self-directed learning. Prior to attending the program, participants complete a 360-degree customized leadership assessment that includes feedback from clients as well as feedback from peers, subordinates, and superiors. On the opening day of the

program, participants meet one on one with professional counselors who review and discuss their assessment results and help them define their learning objectives.

This program is very feedback intensive. In addition to the 360-degree assessment, participants receive feedback many times each day after case study role plays. They are assigned to small client service teams and give each other feedback after each case study performance, and they receive a substantial amount of feedback and coaching from the faculty. The ratio of faculty to students is 1:2, so each participant receives an extraordinary amount of personal attention throughout the week.

The complete agenda is as follows:

Day 1   Program introduction; one-on-one feedback and leadership counseling; case study introductions; client service team kickoff

Day 2   Program frameworks and methods on building trust with clients; case study role plays on trust building; coaching techniques and skills practice in client service teams; learning logs

Day 3   Building alignment with clients; case study role plays on misalignment; entrepreneurial leadership; leading an entrepreneurial CEO; assessing team collaboration; team interpersonal and leadership feedback; learning logs

Day 4   Motivating clients to action; case study role plays on collaborative leadership; coaching an ineffective CEO; learning logs

Day 5   Acting with courage; coaching and skills practice using write-your-own-role-plays; transferring leadership skills back on the job; learning logs

Day 6   One-on-one leadership counseling and learning review from the week; further coaching and skills practice; key takeaways

Several other key features of this program make it unique and very effective.

First, there is virtually no lecture; most program learnings and leadership concepts

evolve from the role plays and case study simulations. Consequently, what each participant learns is different and is based on his/her performance and development needs. Second, the learning for each person emerges from his/her reflections and role-play performance and from extensive feedback. Also, the role plays are done in a play-replay fashion. Each participant plays the role, receives feedback, and then replays the role while acting on the feedback. This learning process enables participants to act on their feedback right away and to experience the difference in impact, which makes the learning visceral and immediate. Third, the process is self-conscious. Before every program activity, participants identify their learning needs; after each role play and program segment, they identify what they've learned, and they record and reflect on their learnings in a learning log.

Learnings are tied to their individual leadership assessments and are reinforced in their many meetings with faculty. In addition, they learn much from observing and sharing feedback and observations with their peers on their client service teams. Finally, the case study method is used, but the participants use these case studies as the basis for role play experiences rather than for an intellectual discussion. At the end of the week, they write and enact their own role play situation and thus transfer their learnings to a context that is immediately relevant to them.

Typically, half the faculty members are professional instructors and counselors and the other half are senior members of the sponsoring organization. Program costs may include a one-time customization fee of as much as $100,000, and each program typically costs about $50,000 for 16 participants, or about $3,125 per participant, plus expenses and materials. Because of the extraordinary amount of

customization, these programs are not available on an open-enrollment basis but must

be sponsored by an organization with a strong commitment to the development of a

significant group of leaders. For further information on Lore's executive programs,

contact Dr. Donald Novak at (970) 385-4955.

Contacts in the Field of Business Leadership

The following people are noteworthy for their knowledge of leadership

development programs in the institutions they serve, and they would be good contacts for

further discussions about leadership development in business:

Warren Bennis, Chairman, Leadership Institute, University of Southern
California, Los Angeles, CA 90089
213-740-0766.

John Kotter, Professor, Harvard Business School, Boston, MA 02163
617-495-6529

Jay Lorsch, Professor and Faculty Chair of the LPSF (Leadership in Professional
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336-286-4433

Annotated Bibliography

American Management Association. *Leadership Development: Programs and Practices, Future Directions, Examples, and Models.* NY: AMACOM Press, 1998.

A report on a survey-based assessment of leadership assessment and development in corporations with case examples from 3Com, Abbott Labs, Chevron, Fortis Financial Group, Unisys, and UPS.

Bass, Bernard M. *Bass & Stogdill's Handbook of Leadership, 3rd edition.* NY: The Free Press, 1990.

An exhaustive compendium of theories and research on leadership in business. A virtual encyclopedia of information on the classic approaches to leadership: trait study, power, leadership as transaction, leadership and management, and situational moderators.

Bennis, Warren and Nanus, Burt. *Leaders: Strategies for Taking Charge, 2nd Ed.* NY: HarperBusiness, 1997.

Warren Bennis is one of the deans of leadership development, and this book with Burt Nanus is an excellent basic text on leadership.

Burns, James MacGregor. *Leadership.* NY: Harper & Row, 1978.

The classic study of leadership, with an emphasis on its moral dimensions. Burns mainly studies political leaders, but this is a profound and essential primer for understanding modern leadership in all domains.

Conger, Jay A. *Learning to Lead: The Art of Transforming Managers into Leaders.* San Francisco: Jossey-Bass, 1992.

An interesting exploration of different leadership development programs by an author who attended five different ones. He discusses the differences in approaches and effectiveness.

Farkas, Charles M. and De Backer, Philippe. *Maximum Leadership: The World's Leading CEOs Share Their Five Strategies for Success.* NY: Henry Holt and Company, 1996.

A Bain & Company-sponsored study that promotes a multi-dimensional approach to business leadership and includes much discussion of current business leaders and institutions.

Fitzgerald, Catherine and Kirby, Linda K., ed. *Developing Leaders: Research and Applications of Psychological Type and Leadership Development.* Palo Alto, CA: Davies-Black Publishing, 1997.

An exhaustive look at the correlations between psychological type and leadership. Useful principally for its research value.

Gardner, Howard. *Leading Minds: An Anatomy of Leadership.* NY: BasicBooks, 1995.

A great leader study by Harvard's Howard Gardner. A well-written and insightful history by an eclectic scholar.

Gardner, John. *On Leadership.* NY: The Free Press, 1990.

A fine study of the nature and functions of leadership by one of the preeminent thinkers in the field of business leadership.

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Another of the classic texts on leadership. Broad in its scope, the book posits that great leaders are servants to their followers and that true leadership derives from the legitimate power granted by peers to leaders who are first among equals.

Heifetz, Ronald A. *Leadership Without Easy Answers.* Cambridge, MA: Harvard University Press, 1994.

An excellent study of the challenge leaders face and the demands placed upon them by followers.

Kotter, John P. *A Force for Change: How Leadership Differs from Management.* NY: The Free Press, 1990.

One of the finest discussions of the difference between leadership and management and about the origins of leadership.

Kotter, John P. *Power and Influence: Beyond Formal Authority.* NY: The Free Press, 1985.

An excellent exploration of the need for leadership at all levels and how lower-level leaders become effective without having formal authority over those they seek to influence.

Kouzes, James M. and Posner, Barry Z. *The Leadership Challenge: How to Get Extraordinary Things Done in Organizations.* San Francisco: Jossey-Bass, 1987.

One of the most popular and widely read leadership texts of the last decade. It suffers from being too simplistic but does offer a concise model of effective leadership in business.

Luecke, Richard. *Scuttle Your Ships Before Advancing: And Other Lessons from History on Leadership and Change for Today's Managers.* NY: Oxford University Press, 1994.

A fascinating study of leadership through the examination of historical leaders like Cortez, Louis XI, Luther, Demming, Yamamoto, and Hadrian.

McCall, Morgan, Jr.; Lombardo, Michael M.; and Morrison, Ann M. *The Lessons of Experience: How Successful Executives Develop on the Job.* Lexington, MA: Lexington Books, 1988.

A superb study of the role of experience in developing business leaders. A seminal text in this area.

McCall, Morgan W., Jr. *High Flyers: Developing the Next Generation of Leaders.* Boston: Harvard Business School Press, 1998.

A thorough and engrossing study of leadership development in business. It focuses specifically on leadership development as an element of business strategy.

McCauley, Cynthia D.; Moxley, Russ S.; and Van Velsor, Ellen, eds. *Handbook of Leadership Development.* San Francisco: Jossey-Bass, 1998.

A recently published examination of leadership development from members of the Center for Creative Leadership. Research based and comprehensive in scope, this is an excellent overview business leadership development.

Spears, Larry C., ed. *Reflections on Leadership: How Robert K. Greenleaf's Theory of Servant-Leadership Influenced Today's Top Management Thinkers.* NY: John Wiley & Sons, 1995.

A collection of essays on the nature and impact of Robert Greenleaf's theories of servant leadership.

Tichy Noel M. *The Leadership Engine: How Winning Companies Build Leaders at Every Level.* NY: HarperBusiness, 1997.

An excellent look at the impact of leadership in business by Noel Tichy, a University of Michigan professor who has worked extensively with Jack Welch at General Electric.

Wheatley, Margaret J. *Leadership and the New Science: Learning about Organization from an Orderly Universe.* San Francisco: Berrett-Kochler Publishers, 1994.

A somewhat trendy but nonetheless interesting discussion of leadership as viewed from the perspective of quantum mechanics and other principles of the new physics.

Wills, Garry. *Certain Trumpets: The Nature of Leadership.* NY: Simon & Schuster, 1994.

One of the finest great leader studies ever written. Wills is a professor at Northwestern University and a Pulitzer Prize-winning author, and it shows.