



TALENTx7[®] Assessment
Identifying and Developing Leaders

Using Learning Agility for Succession Planning and Leadership Development at the J. M. Huber Corporation*

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The J. M. Huber Corporation is a global manufacturing company with multiple businesses. A few years ago, the organization faced the challenge of determining which high potential leaders at a senior level were ready to enter a talent development program to prepare them to move into the various roles of C-Suite leadership, Country Manager, and President. There was a desire to use science in the decision-making process to ensure potential successors could transition effectively into roles they had never performed previously. Ultimately, a decision was made to assess learning agility, because of its link to an organizational agility model and a formal process to develop future leaders.

Several validated measures were used by the organization to identify high potentials. The key measure, the *TALENTx7® Assessment*, was chosen to measure learning agility. The *TALENTx7®* is a comprehensive, easy-to-use instrument that identifies who is most likely qualified and ready for advancement. In addition, competency ratings and experience ratings by multiple raters were used to supplement and strengthen the accuracy of predicted ratings. An important consideration was the desire to prevent derailment of leaders through the self-awareness derived from the assessment, feedback, development, and coaching.

A Blueprint for High Potential Identification

Initially, a “blueprint” was constructed to identify and evaluate high potential leaders. The model was created by Dr. Kenneth P. De Meuse and his colleagues at Leader’s Gene Consulting for defining high potential leadership factors. The heart of the model was the measurement of the following seven facets of learning agility:

- Change Alacrity,
- Cognitive Perspective,
- Drive to Excel,
- Feedback Responsiveness,
- Environmental Mindfulness,
- Interpersonal Acumen, and
- Self-Insight.

While other factors likely predict high potential (e.g., intellect, emotional intelligence, education, ambition, job experience), it was recognized that those factors alone – without learning agility – would not predict high potential leadership. These additional success factors were measured with other assessments, which are described later in this case.

The following eight key steps describe the process for using learning agility in succession planning and high potential selection implemented at J. M. Huber.

Step 1: Identify Leadership Competencies and Map Them to Learning Agility Assessment

The J. M. Huber Corporation had identified a list of leadership competencies important for success in high level positions. This list was developed initially by interviewing top management and the board of directors. An external consultant at National Training Systems (NTS), Inc. strengthened the list by developing competency definitions and identifying specific behaviors for rating each competency, resulting in a set of customized competencies for success at high levels in the company. Subsequently, behavioral indicators of the competencies also were defined that could be rated easily by the supervising manager. The competencies were then linked to the learning agility facets by using an expert panel to confirm the mapping rationale. This step was important to lay a solid foundation for the high potential selection and

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development model as well as to provide a framework for the talent reports.

Step 2: Rate Competencies Using Behavioral Indicators to Measure of High Potential

A competency rating sheet was created to provide numerical ratings for each competency utilizing multiple behavioral items. Those ratings provided guidance on specific examples of performance and work experiences. The competency rating worksheet was completed by each prospective high potential leader's supervisor and others familiar with the leader's performance. The information provided was important for supporting other learning agility data with examples of work experience.

Step 3: Map Learning Agility to Multiple Measures and Personality Traits

Relevant factors were identified across the various assessments to develop a comprehensive view of each high potential leader. The seven learning agility facets from the *TALENTx7*[®] were mapped to both the leadership competency model and the following suite of Hogan assessments – *Hogan Personality Inventory*, *Hogan Development (Derailer) Survey*, *Hogan Motivation, Values, and Preferences Inventory*, and the *Hogan High Potential Talent Report* – to integrate multiple measures and strengthen the predictive power of the overall assessment process. The *Decision Styleview*[™] instrument also was administered to all leaders.

Step 4: Obtain Nominations to Generate Candidate Pool

Next, a list of high potential leaders was requested from top management, supervisors, and the HR leader to develop a pool of prospective high potential candidates. Nominations were based on performance and other high potential criteria (e.g., competencies, ratings on ability to move two levels or into a certain type of position, specific work experiences relevant to leadership in the company, and performance evaluations).

Step 5: Create Individual Snapshot Reports for Candidate Comparison

To facilitate talent and executive reviews, a one-page, color-coded dashboard report was prepared summarizing the data across all assessments for each participant. Additional data on work experience and emotional intelligence were also provided. Summary paragraphs highlighting job experiences and personality traits were included to provide further insight into the readiness or developmental needs of each of the participants. This simple dashboard format made it very easy to compare each candidate's strengths and developmental needs.

Step 6: Craft Targeted Questions for Talent Review to Validate Selection Results

Based on the leaders' assessment results, structured interview questions with behavioral indicators were created to validate results. These interview questions were developed to promote a meaningful talent review and to help calibrate real-life job examples and performance results. Questions also were selected to verify other assessment information, gain information on compensating factors that should be considered in the nomination decision, and to challenge and examine nominated candidates who did not seem to be ready for promotion at this time. In addition, this discussion helped identify certain development experiences that would benefit each candidate.

Step 7: Conduct Robust Talent Reviews Using Objective Data to Reduce Bias

The talent review team met to discuss and review the assessment results for each high potential candidate. The goal was to reach consensus on those most ready to be developed for new opportunities. Having objective data from multiple assessments on a one-page, color-coded

dashboard format helped support ratings of high potential status and minimized the bias and ambiguity common in talent review meetings.

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Step 8: Design Accelerated Development Program

To create the development program, information was gathered from a variety of academic and consulting areas to identify high impact content and tools for developing learning agility. Three programs were designed for each of the one-week executive education programs and development coaching programs. Each program was designed to engage senior leaders by using complex simulations, action learning projects, and a variety of strategic thinking and planning tools. An organizational agility model – referred to as “SCORE” – provided a compass for developing the following five modules:

- **Strategically Agile.** Leading edge strategic tools such as “Blue Ocean Strategy” for creating new market space and the traditional “Competitive Strategy” were used to identify potentially new innovation products for the company. Other methods such as “Design Thinking” and a change simulation were taught to enhance general management skills.
- **Capability Building of Talent.** A general manager high performance simulation was used with participants taking on different functional leader roles with cross functional teams to make talent and other general management decisions.
- **Organizational Design and Decisions.** Scenario planning, using real product lines and custom cases and change implementation was part of the program.
- **Readiness of an Agile Culture.** A comprehensive culture survey that predicts financial performance was used. It employed a multi-year growth metric with cascading action plans on organizational agility areas to reinforce culture and support the overall business strategy.
- **Execution of Strategy.** A strategic execution simulation and a custom new product strategic execution case and tools were used.

Implementation of the Accelerated Development Program

All of the high potential leaders that were selected entered into a three-year executive leadership program created by NTS, Inc. The primary goal of this program was to develop learning agility and other leadership competencies. The first two sessions were separated by approximately 18 months. Near the end of this three-year leadership program, participants were measured again on learning agility using the *TALENTx7® Assessment*. Results showed a significant increase in learning agility scores for leaders on five of the seven facets. As can be seen in Figure 1, 88% of the leaders substantially increased their “Interpersonal Acumen,” 95% improved their “Cognitive Perspective,” 88% enhanced their “Drive to Excel,” 62% increased their “Self-Insight,” and 57% improved their “Change Alacrity.”

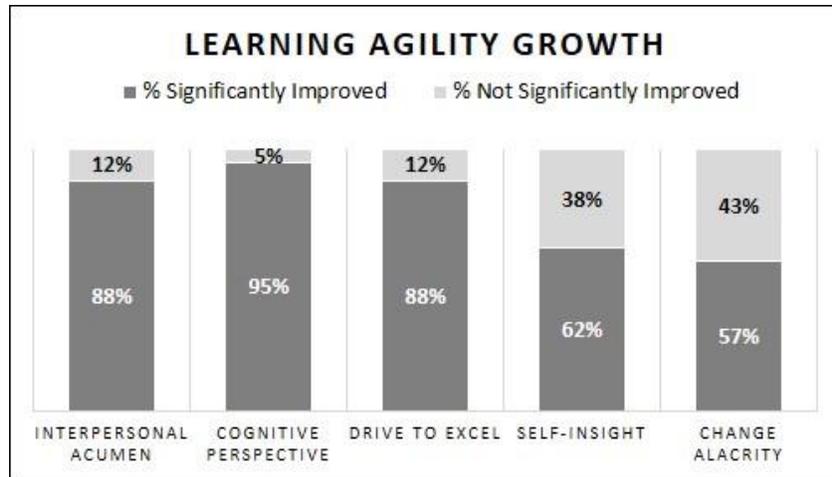


Figure 1. Learning Agility Growth across Time

A team of coaches certified on the three primary assessments used in the program (i.e., *TALENTx7*[®], the *Hogan Suite*, and *Decision Styleview*[™]) provided one-on-one coaching and feedback to all of the high potential leaders who attended the leadership development training. The coaching was intended to supplement the training, help the leaders grow in agility, develop in the factors identified as important for success in higher level positions, and prevent derailment. Particular emphasis was given by the coaches on those assessment scores identifying overuse behaviors to prevent potential derailment.

Because emotional maturity is a common cause of career derailment, coaches focused deeply on this topic for leaders with low scores in this area. For example, the *TALENTx7*[®] facet scores on “Interpersonal Acumen,” “Self-Insight,” “Feedback Responsiveness,” and “Environmental Mindfulness” were explored in detail. Likewise, the derailers identified by the *Hogan Development Survey* were examined. Common themes across the different assessments were especially powerful and helped leaders understanding the importance of changing their behaviors.

The Outcomes

The combination of selection and development programs resulted in an acceleration of the leaders’ learning agility in a short period of time. The *TALENTx7*[®] *Assessment* was a critical part of the high potential development program. The assessment scores provided concrete, objective, and quantifiable data on each high potential leader’s ability and willingness to succeed in higher level positions. The client concluded that this program provided a strong return on investment for the organization due to the identification and significant accelerated growth of the high potential leaders.

Many positive outcomes of the program were realized by J. M. Huber, including:

- Pre/post learning agility scores demonstrated significant growth, and were used to identify high potentials “most ready” to be promoted or given developmental assignments.
- Talent data, such as promotions, expanded job responsibilities, and accelerated “ready now” status were obtained with several leaders who were elevated to top management in a short period of time.
- Direct hands-on observations and support by Presidents, board members, and CEOs

for the growth and complex skill sets of the participants in the programs strengthened confidence in promotion decisions throughout the organization.

- The *Denison Culture Survey* was administered to those employees reporting to the leaders at the top of the organization and showed positive changes in culture between years, suggesting that learning agility was a contributor to these changes.
- Participant evaluations of the three-year development program were very high, reinforcing that the agility content was useful and engaging.
- Pre/post results on the *TALENTx7*[®] clearly demonstrated a significant increase in learning agility scores for those leaders (see Figure 1).

Lessons Learned

A key contributor to the success of the program was the hands-on involvement of the company CEO and leadership team, not only in the design but in the implementation of the learning agility program. Their participation visibly demonstrated their support to the entire organization. Further, it enabled them to more effectively understand the high potential selection and development

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process, preventing biases that often occur in a large organization when executives don't have frequent contact with high potential individuals. Allowing the leadership team to see the full capabilities of each leader provided confidence in decisions regarding future assignments. In addition, a very useful practice was for the executive team to meet with the program

designers at the conclusion of the program to debrief the experience. At that time, key stakeholders reviewed the performance of each participant and gained in-depth insight into their leadership strengths and gaps for identifying developmental assignments.

Additional lessons learned pertained to the inclusion of high involvement simulations in the training design. The simulations accelerated the development of learning agility through real-time feedback. It also enabled us to assess participants before and after training to fully understand the impact of the training. Overall, we found the measurement of learning agility put science and predictability into the talent decision-making process and instilled confidence in the development practices that we used.