

The Missing Link  
in Strategic Execution:

Developing  
Mid-Level Managers  
LEADERS

## About DDJ Myers

DDJ Myers is an industry-thought and best-practices leader that delivers subject matter expertise on board governance, executive development, succession planning, strategic planning, and talent cultivation in the emerging leader population. Our company has been supporting high-performing organizations for more than 30 years and was founded in the 1980s as an executive search firm. Our client base includes credit unions, community banks, financial services, health care, nonprofit, and insurance organizations. Respected industry associations, including the Northwest Credit Union Association, NAFCU, and CUES, have sought out partnerships with DDJ Myers to supply their members with our valuable services. We are prepared to serve our clients with team members in seven locations.

## About the Author

**Peter Myers** facilitates professional development programs for executives and management teams, succession planning processes for boards and CEOs, and strategic planning engagements for credit unions nationwide. Weaving together strategy development, critical thinking, and employee engagement to bridge the talent and execution gap is his specialty. On a daily basis, Peter works with teams and boards to unlock and leverage their organizational, team and individual potential. Peter also co-leads the CEO readiness and talent development program for credit union executives pursuing their next level of career potential and has been a teacher in the award-winning Emerging Leaders Program since its inception in 2012.

Peter graduated from Arizona State University with a B.A. in sociology and a minor in Spanish. He holds a master's-level certification in somatic leadership coaching from the Strozzi Institute, an internationally recognized coaching school, where he was a part of teaching staff for eight years. He is a Professional Certified Coach recognized by the International Coaching Federation and speaks nationally on leadership, CEO and executive succession planning, employee engagement, board/management relationship building, and strategic planning.

## Acknowledgements

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# Executive Summary

If they shortchange leadership development, businesses run the risk of squandering their greatest asset: their people.

To realize tomorrow's strategic priorities, today's mid-level talent must recognize and respond to the challenges that emerge in a continually shifting business landscape. Keeping pace with a steady stream of evolving threats and opportunities cannot be accomplished solely through the top-down dissemination of organizational priorities. What should emerge from the executive level is a culture steeped in learning, empowerment, and intentional practice as a firm foundation on which to establish and implement relevant strategies. Toward that end, effective leadership development addresses the whole person using holistic learning to transform leadership potential into sustainable, responsive performance. Strategic execution is difficult to teach. Too often, businesses expect leadership abilities to spring from minimally impactful and piecemeal one-off trainings offered in day-long workshops, or in the worst case, executives rely on hope as a strategy, crossing their fingers that their leadership talent bench will gain the right experience and skills as a result of project work. If they shortchange leadership development, businesses run the risk of squandering their greatest asset: their people. The long-term strategic opportunity lies with developing mid-level talent to be the champions and protagonists of change.

This white paper outlines DDJ Myers' approach to developing the talents of mid-level contributors and managers to become strategic players in their organizations. The award-winning Emerging Leaders Program (ELP) empowers and engages participants to enhance their competencies, strategic orientation, and productive relationships with peers, executives, and staff. The cohort-based ELP facilitates learning and the application of leadership practices aligned with strategic execution, as demonstrated by the real-life examples and perspectives of program participants shared in this document. The experiences of these participants illustrate how the program can be integrated within the leadership development efforts of a single business entity or seeded across multiple organizations.

# Developing Mid-Level Talent Must Be a Strategic Priority

*“Our people are and will continue to be our most valued and competitive asset.”*

—Steve Elkins, CEO, DuPont Community Credit Union

This leadership transition is already playing out in the credit union industry.

In recent decades, the business environment has become increasingly complex and competitive. Many roles within organizations have become more specialized to serve diverse customers’ needs and expectations within the confines of ever-expanding regulations and the threats posed by emerging rivals and new business models. Maintaining a shared focus on strategic execution has never been more daunting nor more essential.

At the same time, forward-looking organizations recognize the need to build leadership bench strength. As the U.S. population skews older—the Census Bureau forecasts that the percentage of Americans above the age of 65 will increase from 13.1 percent in 2010 to 20.3 percent by 2030—succeeding generations to the baby boomers must be trained to step into leadership positions. This leadership transition is already playing out in the credit union industry, regardless of whether individual financial cooperatives are prepared. According to the 2018 NAFCU, DDJ Myers, and BFB Gallagher Leadership Survey, 52 percent of responding credit union CEOs (and 60 percent of the CEOs of \$750M+ credit unions) anticipate retiring within the next six years. However, a staggering 59 percent of board chairs and 44 percent of CEOs say their credit unions have “definitely not” identified a clear CEO successor, and 17 percent of CEOs say they are “not sure” if the board has identified a successor.

To address this confluence of challenges head on, Elkins says, “I think it’s imperative for all credit unions to focus on leadership development just outside the executive team so they can effectively capture and leverage the growth opportunities before them.” Barry Smith, Senior Vice President/Chief Lending Officer of DuPont Community Credit Union (DCCU), suggests that this leadership development must encompass the “abilities to think critically without restraints” so that emerging leaders are prepared to help their organizations set the best course. >

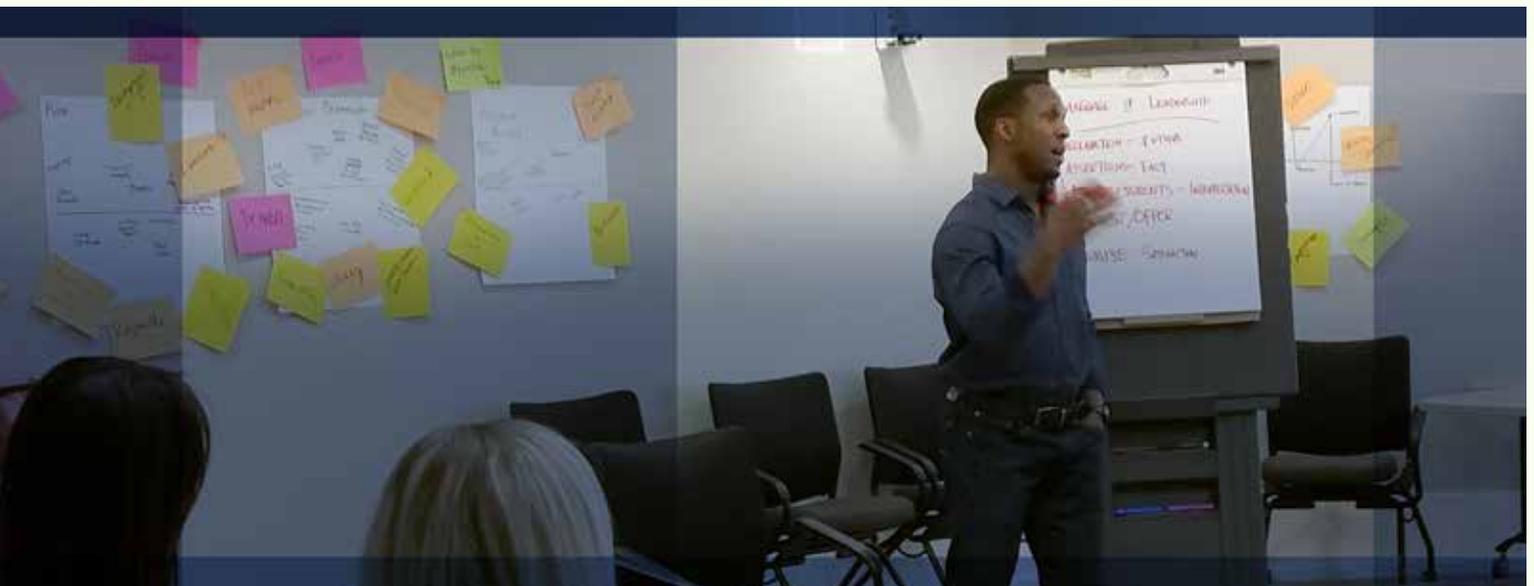
## > Developing Mid-Level Talent Must Be a Strategic Priority

“The solutions to problems and the strategic direction to seize opportunities are sometimes one and the same, and leaders need the skills to assess both, either individually or collectively,” Smith says. “We need to be able to assess when a problem is a problem or when a problem might be an opportunity—that’s where critical thinking lives.”

The ELP is designed to build the critical thinking and other foundational competencies of mid-level talent whose current and future roles are central to solving problems and realizing opportunities. This nexus requires that the clarity of roles, contributions, and certainty of accountabilities are clearly communicat-

long-term impact the company desires to have in the market. This OP transcends quarterly or short-term concerns to underscore the organization’s commitment that will govern all strategies, tactics, and measures of success, including leadership development initiatives.

Strategic execution is elevated when the leadership ranks can frame the allocation of precious resources (capital, labor, etc.) against the OP. Strategic execution is where the organization’s priorities—and often customers’ priorities—subjugate short-term individual goals. Alignment on the collective’s priorities supersede short-term career advancement



ed, embraced, and enacted for the organization to run on all cylinders, so it can ultimately deliver on its promises and market needs.

This is why DDJ Myers, through its leadership development programs and consulting, focuses on facilitating a higher level of strategic execution within organizations. A key step in that direction is aligning end-all/be-all priorities through the leadership and governing ranks. This is where the board, management, and leadership teams endorse a thoroughly vetted Organizing Principle (OP) that speaks to the

because people are “bought in” to all that the OP encompasses and know that if they do “the right thing,” they will be recognized appropriately. In practice, this could mean that an executive or line of business offers to support another’s priorities, possibly compromising individual short-term goals to reach the OP faster or in a more purposeful manner.

For organizations to reach a high level of staff engagement in their OP, their leaders need the skills to effectively communicate opportunities, concerns, and accountabilities. These higher-level abilities to

## > Developing Mid-Level Talent Must Be a Strategic Priority



be in dialog stands in opposition to relying on an inspirational poster in the breakroom as the primary means to convey vision and mission. Strategic execution isn't a final destination or static state of being. It's a momentary phenomenon that is attained when leaders have the insight, patience, and commitment to engage in the right (and sometimes hard) conversations in an objective and dignified manner. Other leadership attributes that support strategic execution are the competencies to envision new possibilities and to frame or "sell" those ideas in a manner that compels colleagues to change their priorities and behaviors. Leaders must also be open to and willing to solicit new ideas that may be better than their own. Reinforcing ego is not part of the formula.

High-performing organizations do not leave the development of these leadership competencies to chance but rather commit to it as a strategic imperative. A proactive commitment to nurturing these abilities in mid-level talent helps translate strategic goals to strategic execution and, in the bargain, takes on another challenge alluded to previously: the vacuum of leadership that retirement and transitions will create if not anticipated and addressed. If unmanaged, executive and CEO positions must be filled with outside talent. While there is nothing inherently wrong with attracting and retaining external executive talent, the board is responsible for effectively facilitating the transfer of leadership from one CEO to the next. Along the same lines, a key executive responsibility is grooming future leaders across business

units. An investment in succession planning and leadership development demonstrates for talented staff that their career advancement is an organizational priority.

Transformative leadership programs differ from traditional talent management training in several ways. Perhaps most visibly, the CEO and other executives are invested in and play integral roles in the learning that supports leadership development, and they hold themselves accountable for the learning outcomes. This approach stands in contrast to directing HR to "teach strategic thinking" in a one- or two-day training sessions using a stand-alone module or method.

Relying on minimally impactful and piecemeal training with the stated aim of advancing the culture to new levels of strategic execution is shortsighted and does not allow participants to learn a concept, practice its application, receive support, integrate feedback, and try again. Intentional and committed practice, generative feedback, and repetition create the mastery of leadership competencies that can't be developed by reading about them on a PowerPoint slide. The advancement of mid-level talent's strategic orientation and tactical execution has to match, if not advance beyond, current executives' capabilities. It lands on the shoulders of executives and the board of directors to prioritize the development of those who will carry the torch into the organization's future—by committing to the development of mid-level talent as a strategic priority. 

# Building Tomorrow's Leaders Through the ELP

“Our people are and will continue to be our most valued and competitive asset.”

Steve Elkins, CEO,  
DuPont Community  
Credit Union

The Emerging Leaders Program is a transformational leadership course that is designed to enable an organization's human capital to become its most valued and leveraged asset and competitive advantage. Honored with the 2013 NAFCU Services Innovation Award, the ELP aims to equip the next generation of leaders with the tools, skills, and resources to become strategic leaders. This program produces a deeper understanding in participants of their current levels of empowerment, which is not yet realized, and accountability for themselves, enabling them to take more effective and decisive action.

The program includes face-to-face training, executive coaching, tele-conference trainings, and participation in a learning community, both in-person and virtually. Modes of learning span self-study, reflection-based activities, leadership assessments (pre and post), and exploratory, strategy development, and performance-based conversations with multiple senior executives built into the program.

The medium by which the participants first apply their learning is concentrated on the framing, articulating, collaborating, and executing of a project that directly ties into the organization's strategic plan. This project is an opportunity for participants to have a sanctioned exploration of their capabilities, to take on new challenges, and to stretch themselves as leaders. While professionals execute projects routinely, through the ELP, participants learn how to anticipate a need, outline and articulate a plan, document and take action, and complete accountability conversations.

“Selling” a project's vision to gain buy-in from key stakeholders in various written and oral presentation formats is a key competency of strategic leaders. To that end, the participants expand their ability to craft a professional narrative in a written business case format and gain valuable experience in presenting to high-level executives in a succinct yet captivating manner. The longevity of the ELP allows participants to learn, practice, apply, adjust, and reorient their projects and skill-set development toward a relevant strategy or tactical initiative in a strategic manner. The evolutionary path the project takes is significant. The participants learn that strategically executing a project takes time, focus, patience, sharp skills, intentional effort to gain buy-in, and individual commitment, or what some refer to as grit.

While the program, at the periphery, focuses on framing, articulating, and executing a project that will forward the strategic plans of the organization, the curriculum concentrates on building the skills of project/tactical development, execution, and coordination so that the project will be executed in a strategic manner. Learning this approach can be repeated time and time again throughout one's career. This program is not about executing projects; it is about developing leaders who execute strategically.

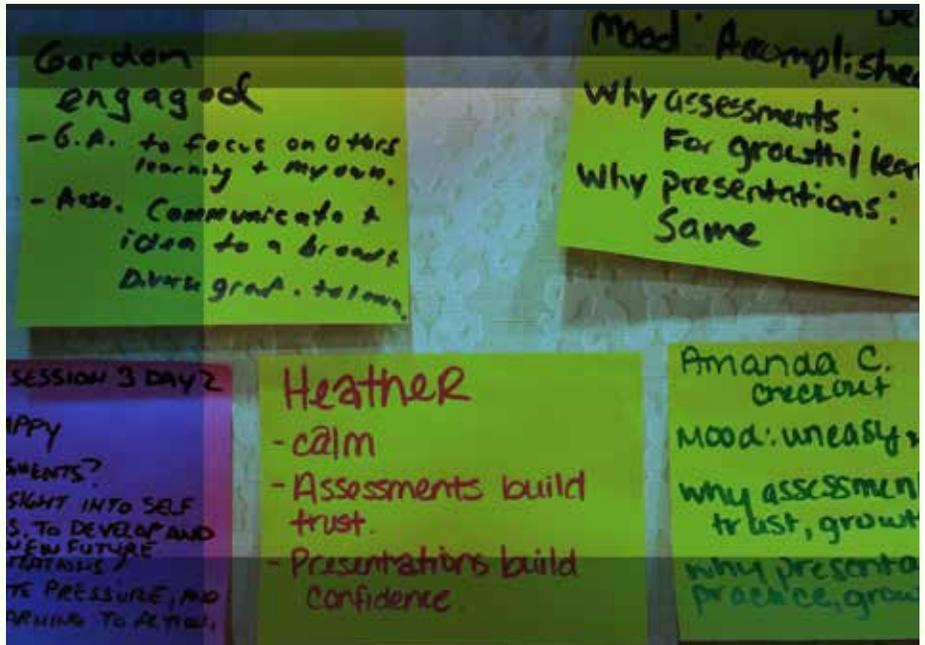
The rigor and level of training and coaching that participants receive is modeled after the leadership development programs delivered to executive teams seeking to operate at more effective, cohesive, and, ultimately,



strategic levels. Participants learn that it is a requirement, as a leader, to hold oneself accountable to the highest standards, to clearly communicate ideas and direction, and to maintain a leadership presence that galvanizes others to take effective action. The ELP provides a robust learning environment for the next generation of leaders to proactively gain these competencies through experiential and impactful learning.

This white paper explores the impact of the ELP on building strategic leadership capabilities through the perspectives of recent participants from cohorts sponsored by an individual credit union and by a credit union association that offers access to the program to its member organizations. DuPont Community Credit Union, a \$1.2 billion, community-focused credit union based in Waynesboro, Va., has sent two cohorts of staff members through the ELP. The credit union's senior leadership team set its sights on developing "leadership downstream" in 2016 and 2017 during a time of executive transition, after then-CEO Gerald Hershey announced his plans to retire. DCCU's executives had worked with DDJ Myers to develop their own strategic leadership skills, and "we were very pleased with the results, >

> Building Tomorrow's Leaders Through the ELP



“One of the key ingredients is solid, quality, future-focused talent.”

Troy Stang, CEO  
Northwest Credit  
Union Association

in the efficiencies and the abilities we'd developed to communicate and face into conflicts in a more generative way," says current President/CEO Steve Elkins. "That's when we started talking to DDJ Myers about the Emerging Leaders Program."

The Northwest Credit Union Association (NWCUA) serves 184 credit unions in Idaho, Oregon, and Washington as "a convener, a thought leader, and an advocate for our movement at the state and national level, promoting the voice of credit unions in the public space," says President/CEO Troy Stang. In support of those roles, NWCUA aims to help build the capacity of future leaders among the 22 thousand people who work for its member credit unions to help "fulfill the expectations of members that their credit unions will remain as relevant as possible in serving their financial needs," Stang says. "One of the key ingredients to do that is solid, quality, future-focused talent."

The industry offers a wealth of technical training in various verticals across credit union operations, Stang notes, but "we also need to be intentional about the leadership development component." Toward that end, NWCUA works with DDJ Myers to offer the ELP to the future leaders of its member credit unions. Now working with its sixth cohort, the program regularly draws new participants from the same organizations each year as those credit unions continue to expand their leadership ranks.

# Who Is an Emerging Leader?

A fundamental tenet of the ELP is that, regardless of title, we are all leaders.

*“The Emerging Leaders Program fulfills an important niche in building next-generation leaders in this movement. We’re in our sixth year—and over those years, we’ve seen participants grow professionally, and we’ve seen their credit unions grow, not only in membership and asset size, but in generating value for members.”*

—Troy Stang, President/CEO, Northwest Credit Union Association

While some may associate the term emerging leader with a certain generation, the content of the ELP does not cater to any particular age or career level. It is designed for those who are interested in raising the bar of their individual, team, and organizational efforts, whether they are individual contributors or leaders of leaders. As an organization institutionalizes a progressive learning and leadership-development culture, it is useful to hold the methodology and pace of evolving organizational culture in mind. A mix of hierarchical layers within the organization represented in an ELP cohort builds on one of the fundamental learnings throughout the program: Regardless of title, we are all leaders.

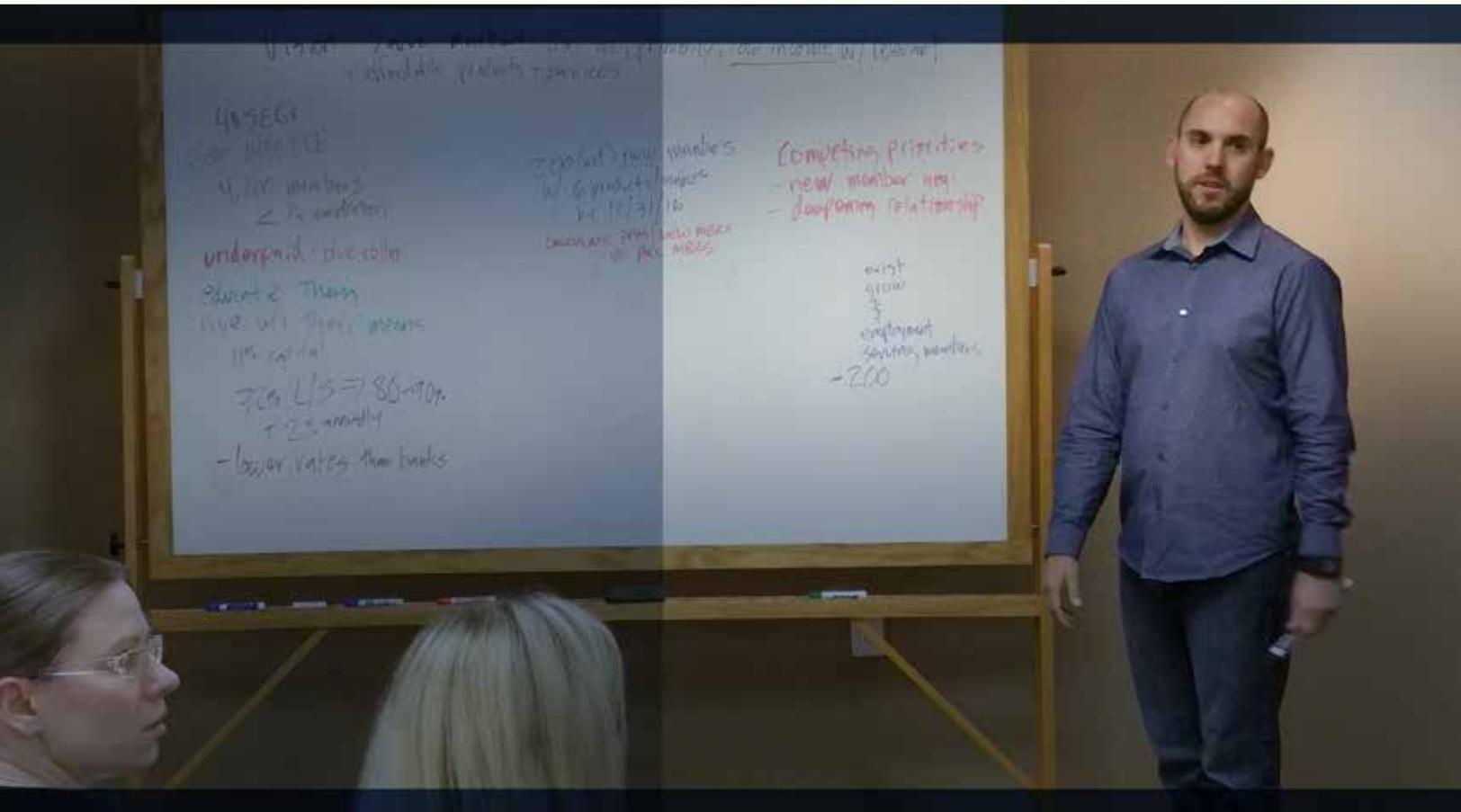
In identifying candidates for the ELP, DCCU executives viewed current and prospective middle managers from a cross-functional perspective. “We realize we have to be very strong in how we coordinate as a business. Every single domain in our organization plays a critical part in our success, so our aim was to have cross-functional representation in the cohorts, which is yielding great dividends as far as their ability to coordinate going forward,” Elkins says.

The NWCUA ELP program is a public course offered to its member credit unions, through which participants are pooled from various organizations. Many credit unions send participants year after year and have instituted a competitive internal candidate selection process, including written essays and interviews. An essential criteria for selecting the first participants for an ELP cohort that is a part

## > Who is an Emerging Leader?

of a credit union's human capital strategy is a preloaded high level of engagement and willingness to learn. As these participants grow and develop as leaders throughout the program, their daily practices, new language, and increasing effectiveness will accelerate the culture's evolution. Others see the tangible difference in their presence, coordination, and strategic execution capabilities. This builds a positive buzz around the program and can become an award and recognition tool in itself.

DCCU executives' expectations for ELP participants were based on "not just what it means to be an effective leader, but how well they can coordinate, how well they can prepare, how well they can develop ideas and assessments of operational situations—and ultimately what strategies can be employed to address those situations," Elkins says. In terms of outcomes, "we've been successful with getting more consistent in all those areas from the executive team down to the senior and mid-management levels."



# Eight Characteristics of Strategically Oriented Mid-Level ~~Managers~~ LEADERS

*“In the race for talent, the Emerging Leaders Program really pinpoints right at the heart of each individual’s gifts, so that it helps illuminate the best path forward to leadership for them.”*

—Denise Gabel, COO, Northwest Credit Union Association

## Featured Participants and Leaders

This section includes the perspectives of these credit union leaders and ELP participants:

**Heather Brammeier**, Accounting Administrator, Valley Credit Union

**Amanda Cashatt**, Card Services Manager, DuPont Community Credit Union (DCCU)

**Jason Clarke**, Vice President of Risk Management, DCCU

**Steve Elkins**, President/CEO, DCCU

**Heather Farrar**, Assistant Manager of the Service Center, DCCU

**Denise Gabel**, COO, Northwest Credit Union Association (NWCUA)

**Joe Krull**, Member Contact Center Manager, Rogue Credit Union

**Jacob Larew**, Vice President of Retail, DCCU

**Jim Newstrom**, Regional Branch Manager, Seattle Credit Union

**Cindy Nuckoles**, Vice President of IT Support, DCCU

**Shelley Pierce**, Vice President of Branch Operations, Fibre Federal Credit Union

**Mallory Randazzo**, Community Branch Manager, Verity Credit Union

**Barry Smith**, Senior Vice President/Chief Lending Officer, DCCU

**Troy Stang**, President/CEO, Northwest Credit Union Association (NWCUA)

**Michelle Wilcher**, Director of Retail/North Region, DCCU

Participants in the ELP bring with them diverse backgrounds, strengths, challenges, and goals for leadership development. As part of the program, they undergo a pre-assessment that helps them identify the skills and competencies that they will work to develop. Cashatt says she appreciated the program’s in-depth and highly individualized approach to developing core leadership competencies that are pragmatic and relevant to the individual. “Other programs I’ve been in are a little more tactical—‘use this model’ or ‘structure your meetings like this’—whereas this program gets to who you are as a manager and a mentor. It takes the widget out of it and makes you work on yourself,” she says.

Larew agrees. “Other programs are just more generalized and not as focused on the individual and self-awareness about the best ways you can move the organization forward.”

Just as they enter the program, participants leave with their own unique blend of new competencies and understanding of what it means to be a leader. However, as the following summary illustrates, emerging leaders take some commonalities back to their organizations.

## 1. THEY ARE COMMITTED TO MAKING THE BUSINESS STRONGER

DCCU’s leadership development is evident in the way managers and staff work together to solve problems, adjusting the pace of their interactions in line with the issues at hand, Smith says. “Our work with DDJ Myers helped us understand that it doesn’t have to be a conversation where we go straight to action. We needed to slow things down and use new tools to become better, more engaged leaders.”

## > Eight Characteristics

Smith cites an example of a project they executed on to improve their home equity loan processing time. “We were able to slow the discussion down and literally ‘white-wall’ the process and give everyone a voice,” he says. “As a result, we were able to reduce the time it takes to process a home equity loan from 45 to 60 days all the way down to less than 3 weeks, which means a whole lot of lift to the organization, and we did it without adding staff. There was some accountability in the conversations, some responsibility, and some vulnerability, which opened up that conversation in a different way. This resulted in an operational competitive advantage yet it was how we were in the conversation really that gives us the competitive edge.”

In other situations, though, “the more trust we build, the more abbreviated the conversations are because we can get to solutions much faster,” he notes. “That shows up when things are going well and not so well. We’re able to face up to those ‘that’s on me’ situations and move on much quicker. We’ve gotten to the point where everyone understands that it’s OK to not have all the answers, to be able to say, ‘That’s a great question. Give me two days and I’ll find out and get back to you.’”

Improvements are also evident in the number of volunteers stepping forward to lead projects and initiatives. “As a \$1.2 billion institution, there are any number of projects and initiatives that need to be coordinated and led, and we’ve expanded the number of folks who are more comfortable and confident and have more trust among themselves in leading these initiatives,” Elkins says. “There’s much more of an attitude of ‘Hey, we’re smart, we’ll figure it out’ throughout the organization as a result of the Emerging Leaders Program.”

Clarke says the camaraderie that developed among ELP participants continues to support their work together for their organization. “It’s not just a matter of shared language, but something more intangible, like a shared commitment to the success of whatever you’re doing in the moment and a ‘safety net’ feeling,” he says.

“We’re in the middle of some big projects, a multidisciplinary effort with people from different departments. Those of us who were in the cohort work through it all cooperatively and easily and able to meet our deadlines.”

Stronger engagement, communications, and coordination among mid-level leaders who participated in the program “helped us to tap into a broader base of strategic thinking,” Elkins says. “They function in an open environment built on trust. It has a generative quality, because people are motivated to be successful, which helps to channel their internal motivation with practical skills and with deeper, broader critical thinking.” DCCU is able to tap into that broader base of knowledge in part because of the mentorship and internal coach component of the ELP. A subset of C-level executives who have experienced their own professional and leadership development act as guides to the participants during key moments of the course. The mentors are charged with continually challenging participants to learn and practice new skills, to engage in richer conversations with colleagues, and to practice their learning with a strategic project. Additionally, participants voluntarily request their mentors’ feedback on how they can keep learning and growing and where they might have blind spots. These regular conversations focus on topics that are professionally and personally important to the participants, providing for the relationships to reach new levels of depth, meaning, and comfort as their learning journey progresses.

Pierce’s ELP project, titled Road to Leadership, focused on coaching and developing a team through one-on-one sessions at Fibre FCU. After initial reservations about the time it would take to meet with staff individually, one of Pierce’s colleagues adopted this approach; as a result, her visits with branch employees have become much more positive and productive. As a relative newcomer to the branch management staff, Pierce was happy to contribute in a meaningful way to her credit union’s staff development.

## 2. THEY BECOME EXCEPTIONAL LEADERS, BECAUSE THE TRAINING IS EXCEPTIONALLY HARD.

“This course is designed to stretch you where it matters.” That’s a phrase ELP participants hear frequently. Stretching, while uncomfortable at times, can produce greater satisfaction with one’s life and work. “The best moments usually occur when a person’s body or mind is stretched to its limits in a voluntary effort to accomplish something difficult and worthwhile,” Mihaly Csikszentmihalyi writes about the mental state he calls “flow” (a term he popularized with a 1990 book of the same title).

When measured empirically, people were happier at work and less happy relaxing than they suspected; a 2016 report from Gallup concludes that “Millennials are not pursuing job satisfaction—they are pursuing development. Most millennials don’t care about bells and whistles found in many workplaces today—the ping pong tables, fancy latte machines. ... Purpose and development drive this generation.” However, millennials are not the only people seeking a challenge. A study from Boston College’s Center for Retirement Research (Sanzenbacher, Sass, and Gillis 2017) found that people who switch jobs voluntarily in their 50s in search of new opportunities are more likely to still be on the job at age 65. In short, people want to be challenged with worthy and meaningful objectives. As a bonus, there exists the possibility of seeing a lift in employee engagement and loyalty.

Those conclusions are borne out by the views of ELP participants about their experiences in the program and in applying what they learned for their organizations. Nuckoles often pushed herself outside her comfort zone, finding the course extremely challenging but ultimately useful and illuminating. “What I found most surprising in pushing through those

exercises that are designed to make us uncomfortable is that I had more capability and capacity than I realized. And the trust I built with the team went past a work relationship to true friendship,” she adds. “I could really say they know more about me than my husband does on some points, which is kind of scary, but also rewarding in a lot of ways.”

Farrar says the confidence she gained by working through the most challenging aspects of the ELP “made me push myself to accomplish things that maybe I would have doubted my ability to do before or I wouldn’t have been apt to go for. It encouraged me to take more risks and helped me develop valuable professional relationships.”

Before starting the program, Farrar admits that speaking in front of others was her biggest fear. As a result of the strategies and practice she gained through the ELP, she says that the presentation she did for the program and the interview for her new management position were the best she has ever done. As a result of the program, “I’ve taken more initiative on my own to go outside of my comfort zone in building relationships with other managers and colleagues. I’ve asked to join in on specific meetings that I thought would be beneficial to my leadership and to my role, and I speak out more when I see it’s appropriate.” The competency gains that Farrar and other participants charted through the ELP are shared in the Appendix.

A recurring message among ELP participants is that the challenging nature of the program helped prepare them for a key aspect of leadership: the need to continually learn additional skills and knowledge to take on new projects and initiatives, including abilities “outside their wheelhouse.” As Rebecca Zucker contends in a recent Harvard Business Review article, “Focusing on lesser-used preferences, competencies or weaknesses presents the best opportunity for learning and development. And research shows that those who remain in ‘learning mode’ ultimately develop stronger leadership skills.”

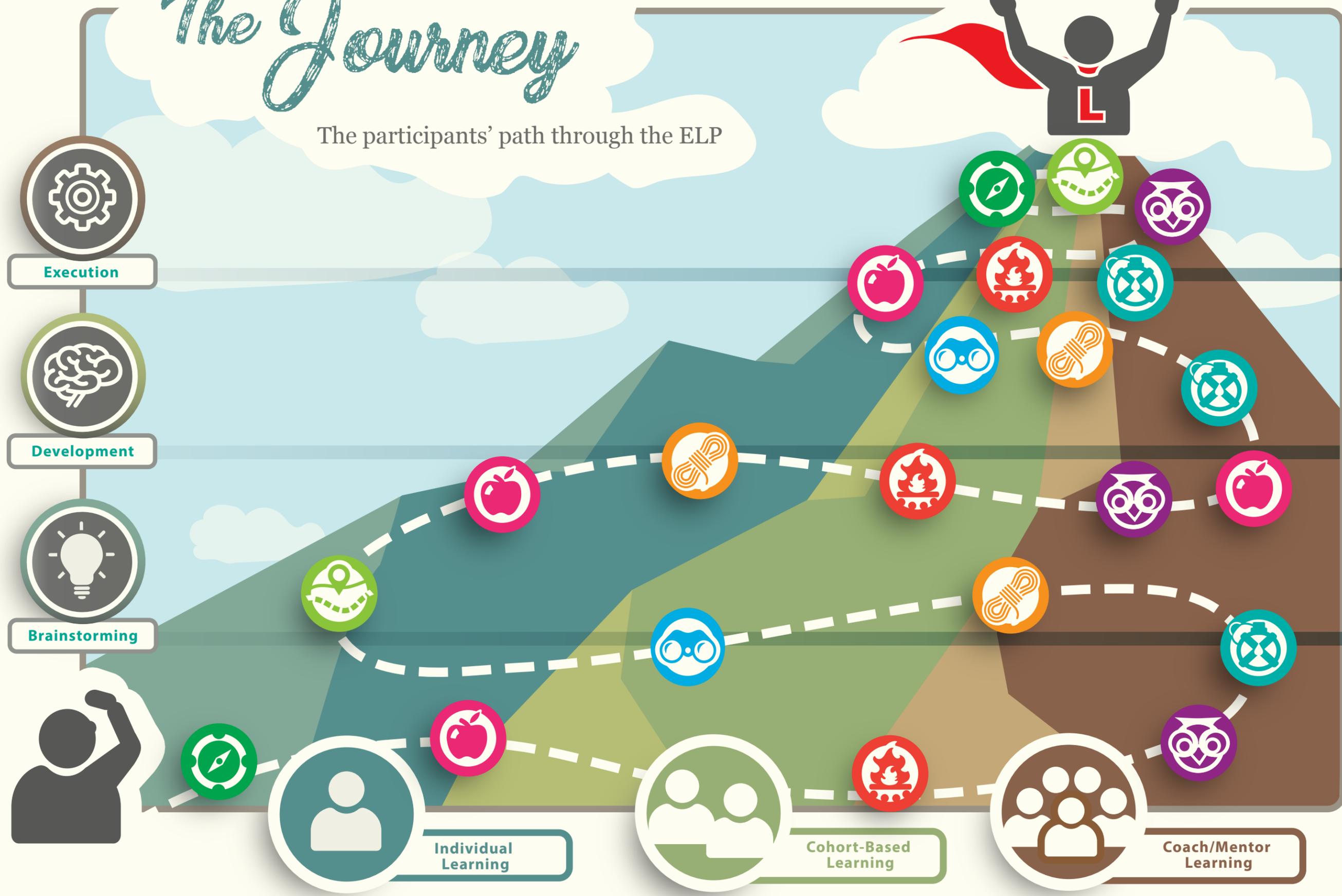


# The Journey

The participants' path through the ELP



-  Leadership Intensive
-  LDP
-  Exec Coaching
-  Mentor Session
-  Homework
-  Webinar
-  Cohort Meeting
-  Assessment



### 3. THEY KNOW LEADERSHIP IS MORE THAN A TITLE. IT'S HOW YOU BE.

Wilcher calls her experience in the leadership development program as “one of tremendous personal and spiritual growth. From Day 1, it really left me realizing that I had a pretty good facade going on about who I was—to myself and who I exhibiting to others—I was pretending to be this person that I really wasn’t inside.” Through her work in the program, Wilcher says she developed insights into her abilities and contributions and the confidence to accept that “I’ve earned my right to be in the room.” That mindset provided a foundation for her work to develop a member service model that helped two DCCU branches achieve significant performance increases.

A common question that arises during ELP sessions goes something like this: “I’ve got situation X at work. Which tool should I use to help me navigate the conversation?” This teaching moment provides the opportunity to underscore that there are no pat answers, no tool A that automatically applies to situation A or that concept B will resolve conversation B. Rather, if leaders cultivate their attention, broaden their perspective, and learn how to draw out and address the central concerns of others, they become the tool. Through their maturation process, participants become leaders with a range of skills ready to effect change when the moment calls for it.

Midway through the program, participants are asked, “What does being a strategic leader mean to you?” In a recent cohort, one participant’s response captured the essence of cultivating versatile leadership competencies that can be applied across diverse scenarios: “You do not wait for the next idea. You are the next idea. [Strategic leadership entails] empowering my team to take on tasks and challenges while maintaining the understanding of our end goal. This now creates some time I didn’t have and allows me to think toward tomorrow and beyond.”

You do not wait for  
the next idea. You are the  
next idea.

A fundamental concept with which Newstrom emerged from the program is that “leaders are people who move things forward. They get results, and they’re inspirational because they bring people along on that journey.” For his part, Newstrom has been working to “be bolder” when taking on leadership roles.

“There are objective and subjective things to work on that drive part of our mission,” he says. “Part of it is behavior-based, a way of conducting yourself that requires that you keep it continually top of mind, to consider, ‘What do I have to do to intentionally show up in this conversation?’”

Clarke’s concept of strategic leadership has also evolved:

“I went into the program thinking that leadership was oversight, and I exited knowing that leadership is participation. In order to bring people together, you have to be there in all ways—physically there, emotionally there, and mentally there for your team members. Every organization has strata. No matter how linear you think you are, there is still a hierarchy of some type, and that’s necessary to get things done. But the understanding that we are all collaborating, I think that is one of the things I took out of the program that changed my leadership style.”

Nuckoles has expanded her definition of leadership from tactical expertise to include strategic

vision and people skills. "It's about the relationships and how I'm coaching through a process or how I'm building someone up as a successor, but it's also about thinking outside of the box and being able to be forward-thinking," she says. "So, I'm still focusing on me in a lot of ways, and how I can continue to grow and what I have to offer. But I'm also working with other managers on what they're struggling through and getting them to see what they have to offer."

One of Farrar's biggest takeaways from the program is that "leadership is not sourced, and it's not a title. It's greater potential that can be achieved through continued practice, building relationships, and getting your staff what they need to follow in your footsteps."

Farrar says that "I want to be agreeable by choice. I had been so busy with just trying to please everyone and always putting others first that I wasn't even concerned with anything about myself, my learning, my leadership, or my success. That wasn't helping me be an effective leader."

Randazzo says the ELP "far exceeded my expectation, because I am still applying the learning every day," especially in the area of improving communication and relationship building.

"I had an opportunity ... to do continual work over time, to really dig deep and do the kind of introspective work I had been seeking to identify my blind spots," she says. "I wanted to be a good leader, and I didn't want to have to wait for 10 years of experience to learn some of this. ... I learned that you don't have to fit in a box. You don't have to change. But if you want to be perceived differently as a leader, then you're going to have to behave differently."

"Going through the program helped me understand the richness of the opportunity I have today, and how I show up every day is certainly informed by the program,"

Randazzo notes. Shortly after completing the ELP, Randazzo changed positions at Verity Credit Union going from a training and development specialist to a community branch manager.

"I learned that I was capable of leading a big project that ended up driving change within the organization. I had developed the ability to work with our executive management team on ideas and potential solutions," she adds. "This was an incredible opportunity. My first reaction was surprise: 'You're handing me the reins?' But I was able to lead the project with confidence as we worked through solutions, with people saying, 'This is something we need to be talking about. This is something that should change.'"

Women working their way into leadership roles face "certain kinds of adversity," Randazzo suggests. In that regard, she learned from the ELP "to step forward among the crowd, to have an idea and be bold. Don't apologize for it. Be cautious and respectful in how you decide to navigate, but you can be strong, straight up, and impactful as a woman in leadership."

Pierce applies a variety of leadership principles in her day-to-day work and life. "I am straight up in vocalizing my goals and aspirations to those I lead and to my direct reports. I'm going to the well for mentorship. I'm continually filling my bus with what I need for me interpersonally. I don't need to ask for permission. I just fill it and grow," she says. She adds that the phrase "going to the well" conveys being present in that moment, to take the time to focus on just that one thing.

A broadened definition of leadership to include "how you be" in both times of ease and pressure equips emerging leaders to define the contextually relevant leadership characteristics they want to strive for during and beyond their participation in the ELP. While some may see this insight of leadership to be great fodder for a bumper sticker, it is extremely empowering and fulfilling. In one current cohort, a seasoned professional who has been in the training business for many decades said, "I don't

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want to change the essence of who I am. I do want to present that 'essence' in a stronger way. I am learning that I can enhance my value and contributions without compromising who I am by simply 'borrowing' competencies when the situation calls for it. I'm learning how to strengthen me."

### 4. THEY MAINTAIN AND MODEL A STRATEGIC ORIENTATION.

ELP participants develop a strategic orientation that can be applied to daily operations, projects, and tactical initiatives. Projects are a derivative of tactical initiatives, which are a derivative of specific strategies, which are the facilitators of the OP. Applying a strategic orientation to each project and connecting its purpose to the organization's overall purpose becomes standard operating practice, enabling leaders to challenge, refine, evolve, and develop the strategies the organization will adopt in the future.

In short, the program offers opportunities for participants to stretch themselves and apply their learning to tangible outcomes that further their organizations' strategic priorities. Cashatt recalls that her group was initially reluctant to dig into the strategic project phase of the program. "The project ultimately brought every concept, discussion about strengths and weaknesses, and vulnerability to light," she says. "It pushed us to do our best work, collaborate, seek to understand, and set expectations throughout. It essentially took everything we'd talked about and wrapped it up."

In developing the vision for their strategic projects, ELP participants practice the skill of "making offers," which, in the context of strategic execution, involves actions such as:

- accessing key information instead of waiting for it to be "served."
- priming coordination skills rather than being told whom they should inform.
- coordinating and making powerful and direct requests of colleagues instead of being indirect

in a gently toned email.

- declaring how to solve a problem, fulfill some need, or overcome an operational challenge as opposed to waiting for someone to tell them what to do or why this project exists.

The shift in focus that results from the regular practice of making offers equips leaders with increased autonomy inside ambiguous situations. The medium by which ELP participants apply their learning is in the framing, articulating, collaborating, and executing of a project that directly ties into their organizations' strategic plan. Elkins notes that DCCU managers who've been through the program "are much more eager and willing to volunteer and have the confidence to take something on."

The ELP curriculum concentrates on building the skills of project/tactical development, execution, and coordination so that projects are executed routinely through a strategic lens. The emphasis on developing leaders who execute strategically, rather than a focus on developing project management skills, is a distinction that is evident in Wilcher's ELP project to create a methodology for frontline credit union employees to become trusted advisors for members. She led a 3-month pilot as part of her project at DC-CU's Stuarts Draft branch to develop and refine an iterative process with her staff.

"Every huddle we had and emails and floor conversations were all regarding this pilot of exhibiting specific behaviors," she explains. "The outcome was improved performance in our scoreboards, but we also saw increases in trust and more solid working relationships. They became much more confident. They started asking for assessments and giving assessments that were useful and centered on the team's objectives. I got several calls from other managers saying, 'I just got out of a meeting with your employee, and I've never see him show up this way before. What are you doing at Stuarts Draft?'"

Wilcher then moved to become branch manager at another DCCU office, which was struggling with performance issues. By applying the same strategic

approach to introduce the member service methodology at the West Main branch, Wilcher led the staff there to realize the same gains as those at Stuarts Draft. Applying what she learned in the ELP helped Wilcher lead performance improvements at two offices, which better positioned her for a recent promotion to regional manager.

## 5. THEY EMBRACE EMPOWERMENT AND ACCOUNTABILITY.

A fundamental tenet of the ELP is that the degree to which leaders hold themselves accountable is what dictates the extent of their empowerment and ability to effect change. This tenet reverberates through many aspects of strategic execution. For instance, leaders are accountable for managing their moods. It is not uncommon for people to rationalize a bad mood by pointing to a stressful work assignment, a pushy colleague, or a harried commute. But that looming job deadline and the driver who cut them off on the highway do not have the authority to determine a person's mood. Instead, each person is in control of managing his or her own emotional outlook. This pivot in reasoning empowers managers to lead their teams to overcome difficult situations. It is not about contriving a smile or to "fake it until they make it." It is about "being in choice" and accountable for their responses to all situations. Accessing this degree of accountability empowers leaders to choose effective attitudes and behaviors that will serve their long-term goals.

Cashatt has applied this tenet; she says that she has taken "a lot of the victim language out of my vocabulary." When situations happen that are beyond her control, she recognizes and has embraced the fact that that she is accountable for how she reacts emotionally and for the actions she takes that affect the outcomes. "In the same way, I now realize that I have full control over my responses and can see the strengths and weaknesses I bring to my job in a new light," she says.

For Clarke, this learning "really flipped a switch for me. I'm making choices that empower me instead doing things that I have to do based on circumstances outside of my control." The leadership-development program helped Clarke recognize the need to take a proactive and deliberate approach to his career. "I had no path or plan. I used to think that promotions and leadership would come to me because people would recognize that I'm doing a good job. And if I wasn't promoted, then maybe I wasn't doing a good job. It was a very passive approach," he recalls. "The ELP helped me see that those were choices that I was making to sit back and not take control, but that there was another path I could choose. The training allowed me to decide what my goals were, what choices I wanted to make, and how to make them. I realized that I had to get out of my own way and put aside a constant state of second guessing and cynicism and give myself the permission to pursue my goals."

As a result of his participation in the program, Larew says,

"My expectations for myself and those who have gone through this cohort have shifted to having a more heightened level of accountability as a leader because we've been given the tools to communicate better; to build better, stronger, trusting relationships; and to work in a more effective way, regardless of whatever initiative we're working on. We've been given the tools to be successful leaders, so we want to make sure we're practicing that and showing up."

Larew now prioritizes taking the time to share his expectations and to communicate about "what's obvious and oblivious" in difficult conversations, which helps him at the office and at home. "Having two children under the age of 3, obviously things can get a little crazy in the house, and being able to center and go back into it has helped me to be a more effective father and husband," he adds.

The program teaches the importance of being self-aware of the message one's whole person is sending, especially in pressure situations. Having a centered presence, being attentive to oneself and to others, at-



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tending to the situation's context, and aligning one's efforts toward the best possible outcome can help build productive relationships and enhance trust, particularly in situations that might evoke negative reactions. ELP participants learn to find congruence between the content of their messages and the ways that they want to "be" when delivering those messages. If they want to inspire a team and compel decisive action, their messages and actions must align. If they need to deliver a piece of unsavory feedback and want the other individual to stay in the conversation and voluntarily come to a joint resolution, their "beingness" may need to be grounded, centered, and direct.

Like Larew, Cashatt found self-awareness regarding her message and delivery to be useful in her work and in her personal interactions. In her home life, she learned to take the time to understand her husband's perspective and to consider which behaviors to model for her son:

"He is a 2-year-old learning about his emotions and how to navigate those, and I think about how my reactions to things feed into how he will learn to react to issues and crises and problems as they come up as he grows. I think about the fact that he is in the ultimate place of learning. He is watching everything I do and sponging every reaction from me and his dad and how we speak to each other."

Regarding the idea that the ELP's leadership principles have both professional and personal implications, Brammeier says, "If you didn't learn that, you didn't learn anything from the program." She emphasizes, "You are not just you at work and you at home. You're one complete person, so where you're at affects all these different areas where you're connected," she emphasizes. Brammeier has incorporated many concepts from the program, including the importance of centering and of tailoring communication to other individuals' styles, into her personal and professional interactions.

During her time in the program, Brammeier switched departments, moving from a member facing position to one as an accounting administrator. After applying what she learned from the program to her new role,

she became more willing to step up and volunteer to take on new projects. "I talk it through with my supervisors, 'Can I help? Can I take this on?' And they say, 'Yes, take it and run with it,'" Brammeier says. "They don't question the decisions I make because I'm constantly keeping them updated about what we're doing. There's some learning I may need to do and some adjustments I may need to make, but I can see more and more that I'm not limited to where I'm at."

The most challenging—and ultimately, most successful—part of the program, Brammeier says, "was really getting my head wrapped around all my potential." She continues, "I did really start to tap into all of me—not just who I thought other people wanted me to be or what I thought I was. I had to dig down and find out, 'This is really who I am. This is really how I operate. This is how to access my full potential.'"

She adds that, as a result of that shift in her perceived potential, "I could see myself being an executive, and that's amazing because I never would have thought that a year ago."

## 6. THEY SEEK, ACCEPT, AND SHARE ROBUST FEEDBACK.

Actively seeking out and obtaining feedback reflects a commitment to being seen and to being held accountable to the values leaders proclaim. This willingness to request and give assessments also demonstrates a commitment to learning, deepening relationships, and to being exposed and vulnerable. The acquisition of critical (i.e., astute and relevant) feedback from trained observers is central to broadening one's perspective and increases their attentiveness to future possibilities. Receiving outside assessments also helps keep leaders grounded as a light is shined into the corners of their leadership blindspots, avoiding the possibility that they will become "legends in their own minds."

Leaders tend to be quick to give feedback but often have a hard time accepting it, Krull argues. He now purposefully asks his team for assessments of his performance to further his own learning. In addition, he notes that “the program helped me to improve a great deal in giving quality assessments to my direct reports. I now ask someone’s permission before I offer an assessment, and that has been very helpful in building relationships and improve my coaching,” he says.

Applying what he learned about the importance of giving and receiving candid assessments is an ongoing challenge for Newstrom. “Giving honest feedback has always been hard for me. There’s been a gap

“We swallow greedily any lie that flatters us, but we sip only little by little at a truth we find bitter.”

– Denis Diderot, 18th century French philosopher

in what I’m thinking and what I say. I didn’t want to hurt people’s feelings or push into an uncomfortable place,” he explains, “but the program taught me that, if you want to help people, you have to be honest with them. You have to do that in the right way and be authentic. It’s a work in progress, a difficult journey, because I’m rewiring many years of behavior, but I’m definitely farther down the road than I was.”

Actively and continually soliciting assessments can help build trust with others, both directly and indirectly (as those who observe the solicitation see the openness and may extend more trust). An increased level of trust means a greater chance that others will be open and receptive to one’s intentions, future actions, and feedback. The degree of trust in an assessment conversation is positively correlated with the quality

and level of engagement, communication, and coordination in that conversation.

Participants usually enter the feedback portion of the ELP with a certain level of timidity and hesitancy. They tend to think of “assessments” as an annual, one-sided (top-down) exercise that many people dread. That process is complex and can be tied to an individual’s financial livelihood, which further complicates the process. People’s views of these interactions are even more cumbersome because leaders are not necessarily taught how to develop and deliver these assessments in meaningful ways. Even if leaders offer only the most supportive, yet corrective in nature feedback to their staff, they cannot be sure that the recipients have the emotional wherewithal to readily and openly receive it. The competencies that leaders require to deliver robust assessments in a manner such that the receivers ask for further assessments every three months are not routinely taught. One of the avenues that organizations employ to work around leaders’ lack of skills and readiness is by implementing anonymous 360 assessments. This tool does have a place in organizations; however, leaning on anonymity in developmental feedback eliminates the opportunity to create closer and more accountable bonds between colleagues.

“Do I really want to know what others think of me?” That sometimes feels like a dangerous question to pose. However, for leaders who seek to grow in ways that support their leadership development, it is invaluable to gain face-to-face insight into how others assess your leadership.

Without feedback on their performance, leaders can end up “floating in the sea of ‘I’m doing OK,’” Pierce cautions. “But really, we want to do better than that. We want to be better for those who we report to, so it helps to continually ask for feedback as part of professional development.”

Giving and receiving assessments starts with a commitment. What is each individual really committed to being as a leader? How do they want to be seen? >

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What impression do they want to make? Most importantly, how willing are they to learn? A participant's answer to these questions forms the basis of their leadership commitment—a simple and succinct statement by which each participant declares that they are placing the proverbial stake in the ground to determine how they will be measured in the future. ELP participants develop their leadership commitments through the program. As they navigate the terrain of the course, encounter and face into new situations, and test their skills, they learn to refine their leadership commitments to more accurately reflect their long-term developmental priorities. For many participants, their leadership commitments provide guidance for years after completing the program.

“The ELP provided me the opportunity to consider, ‘OK, I have something of value to say, but is this the place to say it? Or do I want to take someone aside and have that conversation?’” Nuckoles says; she adds, “I had a whole conversation with one of the ELP members recently to provide an assessment of how I felt when we came out of a meeting. It was a very good conversation, and they were thankful for the assessment, but I would not have done that” before participating in the program.

Wilcher says that the ELP has led her to move outside her “safe place of communication” to seek out the opinions and perspectives of people who hold different—or even directly opposing—views rather than seeking to primarily “bounce ideas off of peers who I felt shared the same views.”

Randazzo has been able to apply this principle to carefully and productively attend to opposing views, both at work and outside of it: “There’s a gentlemen on a local board I serve on who I used to butt heads with a lot,” she notes; however, she explains, “I’ve started to understand him a little bit better and to realize that what he’s saying to me is not personal. He’s not trying to shut me down. We’ve actually come to realize that we’re on the same page about a lot of things.”

Smith suggests that an environment of trust is essential in facilitating honest assessments (both giving and receiving). One of the people who directly reports to him is committed to becoming a more direct and discerning leader; regarding that person, he says, “I can provide guidance in certain situations to say, ‘I don’t think you’re looking at this through the lens of discernment.’” He notes, “All of that begins with trusting each other enough to be open to receiving feedback and learning from it.”

In addition to empowering staff members to work more independently, building trust allows leaders to freely admit that they don’t have all the answers and to ask for feedback on their performance. A DCCU manager who coaches staff members, Larew says, is comfortable asking, “How am I showing up? Are you getting what you need?”

“This is what I’m working on. I want to be more self-aware,” Larew adds. “That level of vulnerability is key to building trust and establishing long-term, effective relationships. It matters in your personal life, too: The more vulnerable you can be, to a certain extent, with your partner or with family or friends, the more you can knock down walls and create a higher level of trust.”

Vulnerability in leadership “humanizes everyone,” as Cashatt says: “It makes people more honest, more open, and more willing to receive feedback, and ultimately, it makes all of us, regardless of our commitment, a little more bold—to ask questions or to push either up or down, to make a request of our boss to say, ‘I’m not getting what I need from you’ or ‘I need more help from you in this area.’ It gives us permission to push each other in a healthy way and develop each other, regardless of where each person falls in that hierarchy.”

In sum, generative and robust feedback is a requirement to leadership maturation and individual growth and has the potential to enable deep-seated trust.

## 7. THEY PRACTICE CONTINUALLY TO DEVELOP THE RIGHT SKILLS IN THE RIGHT ENVIRONMENT.

Consider this simple, common example of how an individual's skills, traits, and orientation are shaped: A tactical need arises, and a senior executive makes a request of the individual, who executes on that request. Check the box. Project completed. Then another tactical need comes up, but this time, it is defined more as a problem. The executive's request to fix the problem is laced with a greater sense of urgency, causing the individual to deprioritize other projects and "put out the fire." Another box checked. Good job. This pattern tends to accelerate and be repeated week in and week out, so that teams often end up complaining, "We're so busy running 100 mph getting things done." Oftentimes in DDJ Myers' organizational development work, executive teams are often surprised to discover how much time they spend in this reactive mode.

This tendency cultivates and reinforces skill sets that are tactical and narrowly ("fire") focused, rather than the strategic and collaborative competencies that so many leaders say they want to nurture in mid-level leaders and staff members. Bridging that gap is a substantial and relevant challenge, and it is represented in two key questions:

1. How can the environment best support the development of new strategic skills?
2. What are the right skills for strategic leaders to develop?

A simple answer to the latter question is that the "right" skills are not uniform; each emerging leader needs a distinct skill set. To expect a layer of leaders to have homogeneous skills would be overly presumptive and would underestimate the influence of context. Determining the skills that would help make a given leader more successful is based on the product of individual and professional priorities

times the strategic plan times the functional area's objectives times the environment, and the support team. To put it more simply, the right skills to develop are important and contextually relevant for both the individual and the organization.

The ELP addresses this skill-development concept in a variety of ways. First, prior to arriving to the course, the participants complete a leadership self-assessment to measure their current investments of energy and attention through the use of three psychometric sciences. This pre-assessment immediately and accurately uncovers how they are navigating the world prior to beginning the ELP's journey. The three sciences assess their capabilities, capacities, and preferences in the following dimensions:

1. Behavioral profile (DISC): This profile identifies their preferred and adaptive behavioral approaches to opportunities, problems, and challenges; it is based on Dr. William Marston's behavioral research.
2. Driving forces: This dimension includes their most and least significant motivators; it is based on Eduard Spranger's work in defining the human motivation and drive.
3. Personal mastery competencies: This dimension comprises the readily transferable soft skills that they use most or least frequently. This work is based on Dr. Bill Bonnstetter's research on the growing need for employees to be successful in the workplace (Gosselin, Rivera, and Bonnstetter in press).

Second, through a set of prescriptive conversations with their direct executives, other senior executives outside of their functional hierarchy, their executive coach, and their peers in the cohort—and, of course, after their own reflection—participants select a set of skills to target for development. Through these conversations, they outline the specifics as to how each skill will manifest and describe its preferred impact; this is documented in their Leadership Development Plan (LDP). >

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The LDP is the medium by which all the parties listed previously will direct their supportive attention to the participant, provide feedback, and document and validate the participant's progress. The LDP captures participants' self-assessments of their current roles and impacts in their organizations, their professional goals, their desired future contributions to their organizations, and, of course, their specific action plans for tangibly launching and guiding their development. The LDP is continually sourced and updated to specifically direct and focus the participants' efforts.

The dialogue that leads up to the formulation of endorsed and supportive goals reveals the ways in which all relevant parties can support the participant's growth. If a participant's goal is to develop a more autonomous and self-sufficient team, for example, then the executive to whom that participant reports can support this progression by setting targets for the participant to spend X percent less time putting out fires and Y percent more time coaching and developing staff. This executive could be partly responsible for the number of fires the participant manages, so shifting the "firefighter assignment" to other individuals can help other people become more operationally adept. This creates the space and opportunity for multiple parties to develop skills.

The manner by which participants demonstrate their development of the targeted skills culminates in the development and execution of strategic projects. Although participants can make progress in these skills and practice them during the program and on the job, such projects allow them to engage in more focused efforts to stretch, without a requirement for perfection. As a reminder, these projects are sanctioned explorations of the participants' desired leadership potential. Their organizations, executive teams, and executive coaches, as well as the curriculum itself, support the cohort's participants trying, refining, learning, and practicing new behaviors and traits for the sake of self-actualization and to ensure that the organization fosters adept, well-rounded, and satisfied leaders.

As the ELP draws to a close, the participants retake the behavioral profile, driving forces, and personal mastery competencies leadership assessments. The

intent of retaking these assessments is threefold:

1. Participants are equipped with an assessment of their current measurable leadership traits.
2. They are able to more objectively measure their shifts (deltas) as a result of participating in the program.
3. They restart the process of dialoguing with the relevant parties to discover, select, and focus on the most relevant skills. This is documented in the next iteration of their LDPs.

The participants receive charts and graphs to highlight the deltas of their assessment data (the increases and decreases in emphasis), offering a literal picture of how they are currently oriented as leaders. A few surprising ("ah-ha") moments tend to occur as participants review their progress. Even though every individual takes the same course, their shifts are not uniform. Each participant experiences material shifts in his or her results in a unique way. Many participants experience increases in certain competencies and traits, and some also see decreases in their reported competencies and profiles. An increase is not inherently good just as a decrease is not morally bad. The shifts are a quantifiable reflection of how they have refocused and prioritized their energy and attention (see the examples in the Appendix). Still, each person comes out feeling like a more capable leader. This underscores the fact that the right skills are not universally and timelessly defined.

## 8. THEY AIM TO TRANSFORM THEIR TEAM, THE ORGANIZATION—AND THEMSELVES.

The stakes are high for credit unions in a hypercompetitive and ever-changing financial services marketplace; strategically focused leaders can make the difference in whether their organizations make gains and remain relevant with members.

"The Emerging Leaders Program fulfills an important niche in building next-generation leaders in this

movement,” Stang says. “NWCUA is in the sixth year with the program, and over those years, we’ve seen participants grow professionally, and we’ve seen their credit unions grow, not only in membership and asset size, but in generating value for members.”

“That doesn’t happen on its own. It takes strong leaders—and you can’t look to vertical technical training to fulfill the needs of those leaders,” Stang says. “We are passionate about the cooperative model of finance, which requires intentionality to offer consumers a cooperative choice. Leading a financial institution today is more complex than it was yesterday, and it will be even more complex tomorrow. It requires strong leaders, and the competition for talent is something that is here to stay. There has to be an intentional investment to develop talent, and the Emerging Leaders Program has been an effective vehicle to do that.”

Newstrom summarizes the ways in which the ELP has helped sharpen his focus on his role within his credit union: “I actually don’t think in terms of my role or career, but rather boldly working toward the betterment of the organization, for the members—and feeling that this will lead to me being in a better place.”

At the ELP, participants form strong bonds, and they continue to support each other, professionally and personally, long after their participation in the program ends, Pierce says. “I can send out an email, and within five minutes, I’ve got five responses from different perspectives. I can take that to our executive team and say, ‘Here’s what our industry is doing.’ It wasn’t just a six-month program, here’s your certificate and you’re out of here. We’re still connecting monthly, reaching out to each other as a cohort to continue to grow and challenge each other.”

A fundamental revelation for Randazzo in thinking through how she came to define leadership as a result of participating in the ELP; she had previously defaulted to a “title-oriented” assessment of what makes a leader.

“I think, more than anything else, I realized there’s no script. It’s really up to you how you want to show up as a leader,” she says. “You are the creator of your own destiny. You are in charge of your perspective. And if you don’t like something about that, then it’s up to you to change it. No one’s going to do it for you. You have to do the work. Every day we get to choose. Are we going to go out and get something, or are we going to wait for something to be handed to us? That was the empowerment I needed.”

No one’s going to  
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the work.

The impact of DCCU’s participation in the ELP has been enhanced by top-down support for leadership development, Elkins suggests. Executives and mid-level leaders who’ve been through leadership development have adopted the same approach when leading their teams, and this cohesion has helped facilitate the credit union’s continued growth—creating a “tailwind” to improve strategic execution, to communicate and face into conflict more effectively.

“It’s been a game changer for us. It’s been the most beneficial work we’ve been in as an organization in the 15 years I’ve been here,” Elkins says. “I’ve never seen anything that has been adopted as consistently and as organically. Our participation in this program has started a cultural wave of change. We’ve always been a successful organization, but this has given us more confidence and energy around pursuing ways to build on that success.”



# Showcasing Growth

As part of the ELP's completion ceremony, participants make a presentation to a select audience to showcase their strategic project's objectives and outcomes, along with what they have learned about how to be a strategically oriented and more capable leader. For the NWCUA public program, students also have the opportunity to volunteer and speak at the annual MAXX convention, where they can showcase their projects and promote their capabilities

succession planning taking shape, and staff members see their colleagues in a new and inspirational light.

After the 2017 MAXX presentation, we received an unsolicited email from a 2015 alumnus stating:

"Just before the ELP session, a good friend of mine had been complaining about her role, not being happy, and about trying to find another job. She was going to talk to her supervisor about it the following week. She walked out of the session and said "No..... I am changing my game plan. I am not going to go into the meeting next week and talking about how unhappy and how miserable I am. I am going to go in ready to talk about what I think I can add to the organization, and how I can do it, and why I think it is a good idea. I am going to directly ask for what I want, and for what I know I can do."

It's been the most beneficial work we've been in as an organization in the 15 years I've been here. I've never seen anything that has been adopted as consistently and as organically.

Our participation in this program has started a cultural wave of change.

It is clear that the participants *were* their learning and it provoked a new mindset for the friend who wrote that message. The presenters spoke in an authentic fashion about the highs and lows of stretching themselves to learn and grow while developing and executing their projects. There was no fluff—just rich content presented by accountable leaders. That cannot be manufactured or bestowed through a management title.

At the 2017 edition of MAXX, DDJ Myers presented the skill growth of the five presenters, highlighting their tangible and measurable skill development. On average, the five presenters enhanced their self-starting and resiliency soft skills by 38 percent and 29 percent, respectively (see the NWCUA MAXX Convention Speakers - Soft Skills Comparison chart in the Appendix). The audience at the presentation, which included C-level executives, were then asked to ponder, "What would be the impact of your mid-level talent increasing their ability to demonstrate personal initiative and quickly recover from adversity to this degree?"

ties in front of a diverse population of directors, executives, and peers. This is an opportunity for all to see what participation in the ELP means to organizations and to the presenters. Board members see long-term

# Conclusion

Every credit union seeking to enhance organizational performance should commit to developing its mid-level leaders to play a more substantive role in strategic development and execution. Playing an active role in defining the organization's "why" does not mean that every passion project will be greenlit. But when mid-level managers across business units have the skills and insight to participate effectively and generatively in the forum for strategy development and execution, they will, of their own volition, more effectively offer and present their ideas to further the organization's Organizing Principle. And when they hear "no" or "not right now," they will have the emotional container to understand that, while they gave it their best shot, this was a learning experience for them to grow and more clearly understand their credit union's priorities.

DDJ Myers' Emerging Leaders Program offers a wide-ranging framework for mid-level managers and other staff to develop the competencies, knowledge base, and relationship-building capabilities required to support strategic execution. As the perspectives and experiences of ELP participants shared in this white paper illustrate, strategically oriented leaders exhibit these characteristics:

1. They are committed to making the business stronger
2. They become exceptional leaders, because the training is exceptionally hard.
3. They know leadership is more than a title. It's how you BE.
4. They maintain and model a strategic orientation.
5. They embrace empowerment and accountability.
6. They seek, accept, and share robust feedback.
7. They practice continually to develop the right skills in the right environment.
8. They aim to transform their team, the organization—and themselves.

Cultivating these characteristics requires committing to a long journey and setting aside some attitudes and behaviors that may stand in the way of effectively leading a team or department. Developing these interwoven characteristics entails intensive learning with support from organizational leaders and mentors, intentional and committed practice, generative feedback, and repetition. Assess your organization's mid-level (and executive) talent through these lenses. Emphasis on one, without the others, may miss the mark.

The methodology employed in the ELP and DDJ Myers' other professional development and strategic planning programs is to routinely assess the environment (e.g., market needs, organizational and team goals), overlay and be transparent about individual priorities, and develop and work a plan that incorporates challenging and relevant assignments to individuals and the team. Instructors and participants share the plan, continually discuss priorities, relentlessly seek alignment, face into the difficult conversations with a generative intent, and ask for feedback from the concerned parties. None of this is easy, so this refrain bears repeating: If you want exceptional leaders, the training must be exceptionally hard.

This methodology and organizational commitment provides boards and executive teams a continual assessment of the portfolio of skills they currently have, allowing them to make direct and indirect connections to quantitative results. They then can more clearly see the connections, correlations, and causations and prioritize the development of the portfolio of skills they will need to provide long-term value to their membership. In the end, we believe, growing and developing our most valuable asset is the best way we can contribute to our shared philosophy of "people helping people."

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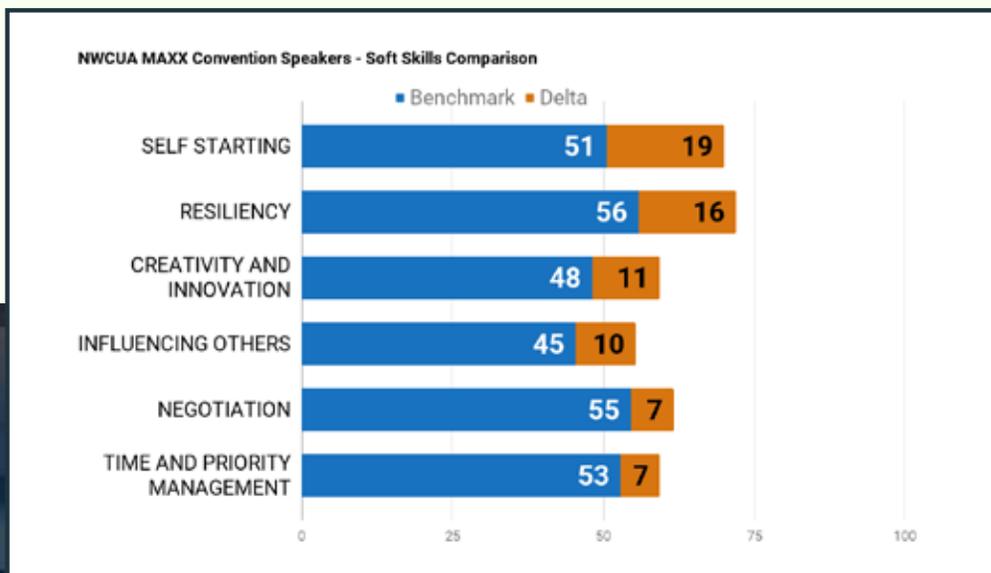
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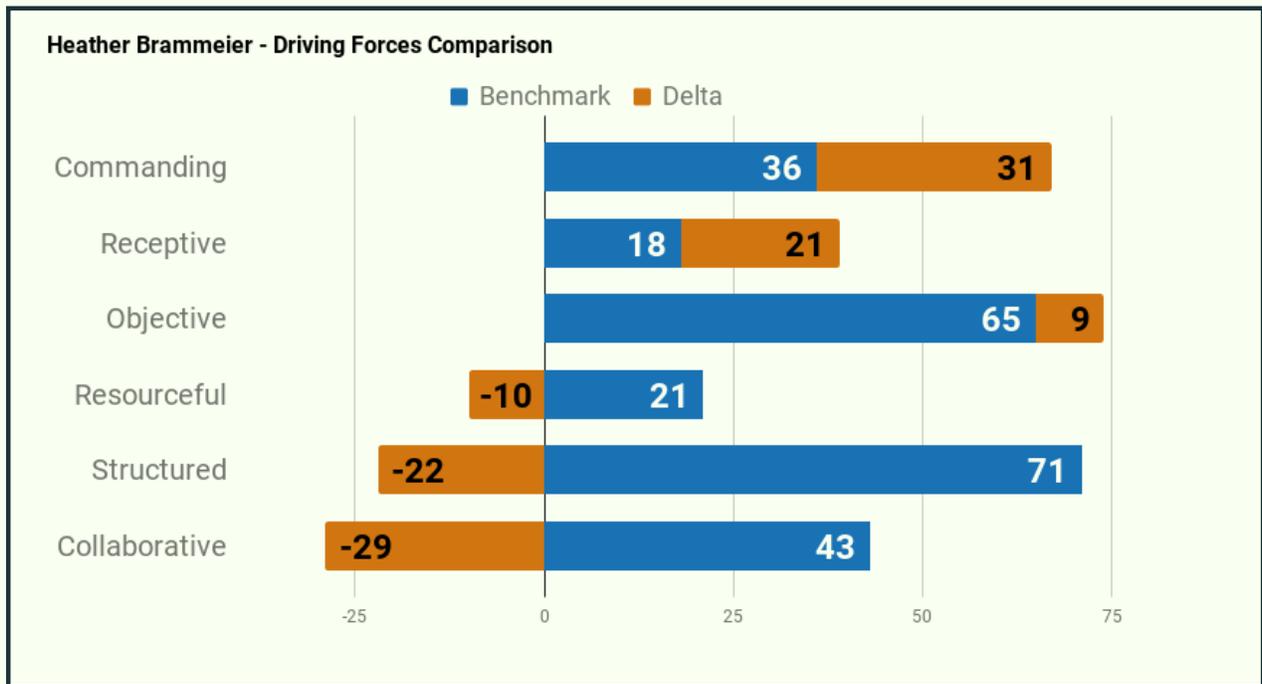
# Appendix

The charts presented in this Appendix offer a subset of the leadership-assessment data from the participants and committed learners who are described in this white paper. The intent of these displays is to provide readers with visual representations of the participants' starting positions (benchmarks) and their post-ELP growth, or achieved shifts (deltas), in soft skills, behavioral profiles, and driving forces. Accompanying each individual chart is the self-authored leadership commitment statement that the participant used as a guide during and after the program as well as a brief interpretation of the graphs.



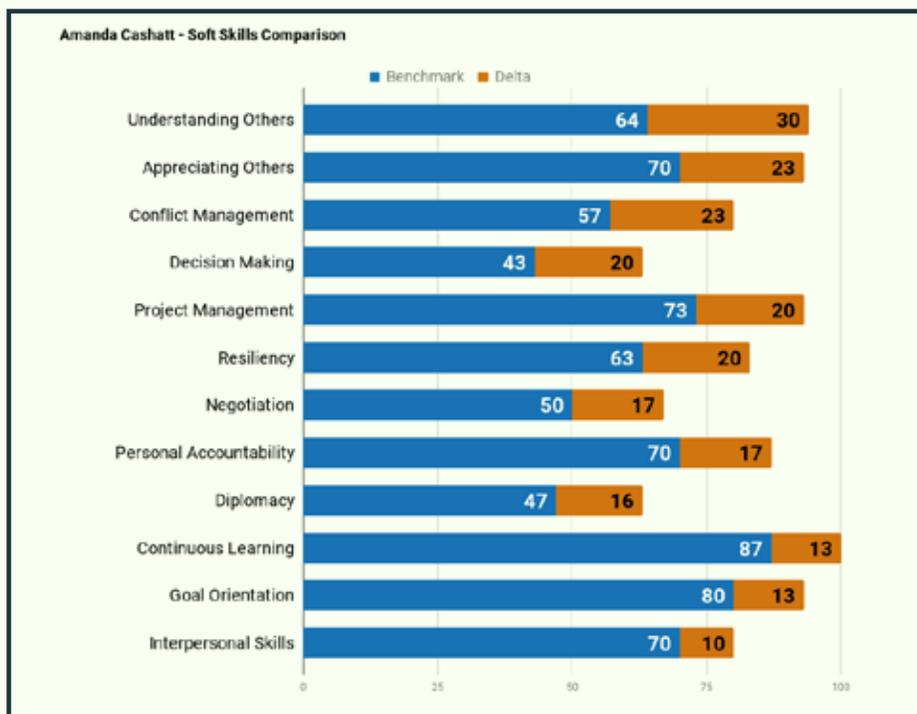
Soft Skills of the MAXX Presenters:  
Heather Brammeier, Joe Krull, Jim Newstrom,  
Shelley Pierce, and Mallory Randazzo





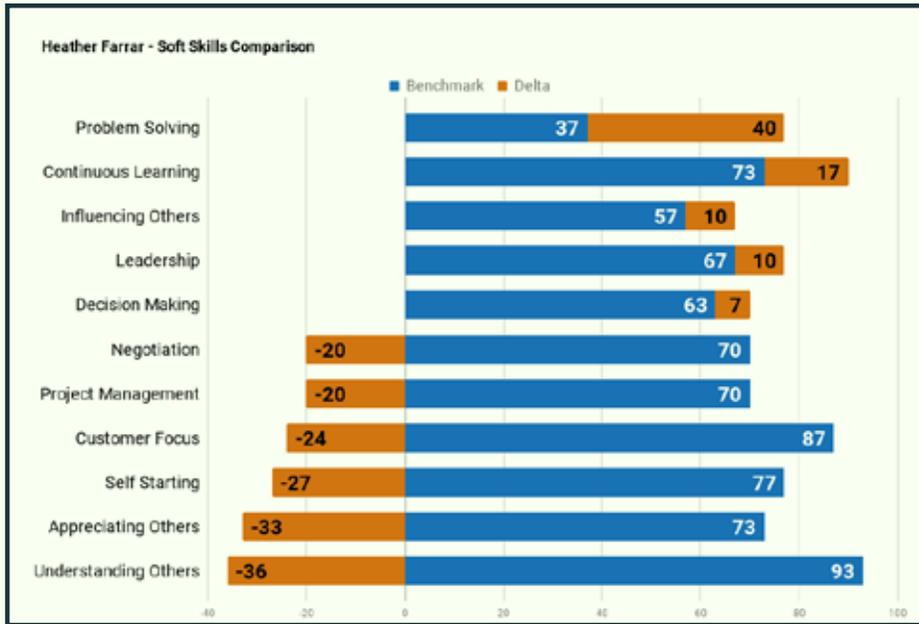
#### Heather Brammeier

- Leadership Commitment: "I am committed to be a confident leader that inspires others."
- Brammeier embraced and acted on her empowerment (commanding) and deferred less of her granted authority to the collective team (collaborative).



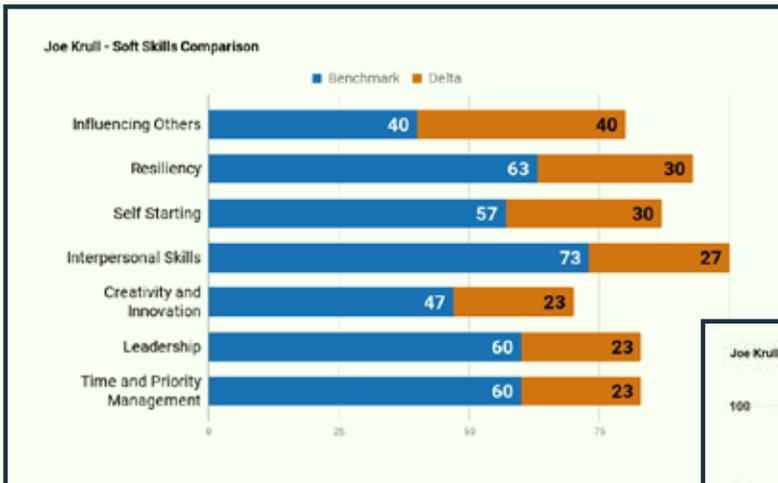
#### Amanda Cashatt

- Leadership Commitment: "I am committed to being a more self-disciplined, vulnerable leader."
- Cashatt's soft skills substantially shifted, enabling her to better understand, appreciate, and lead others and to do so in a more structured and diligent manner.



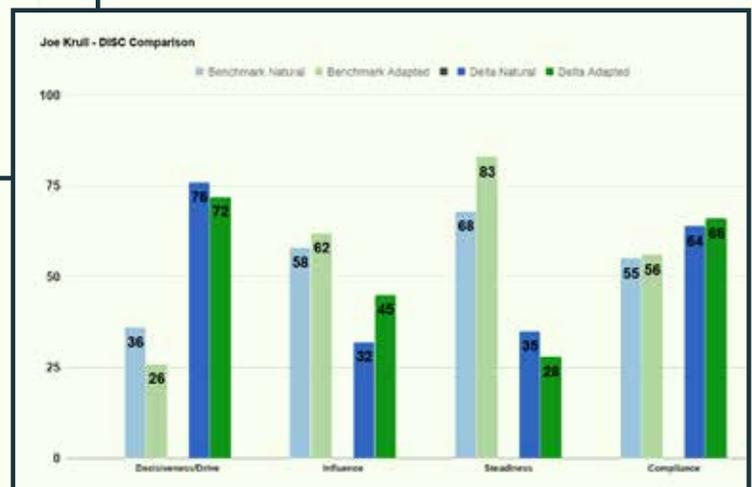
### Heather Farrar

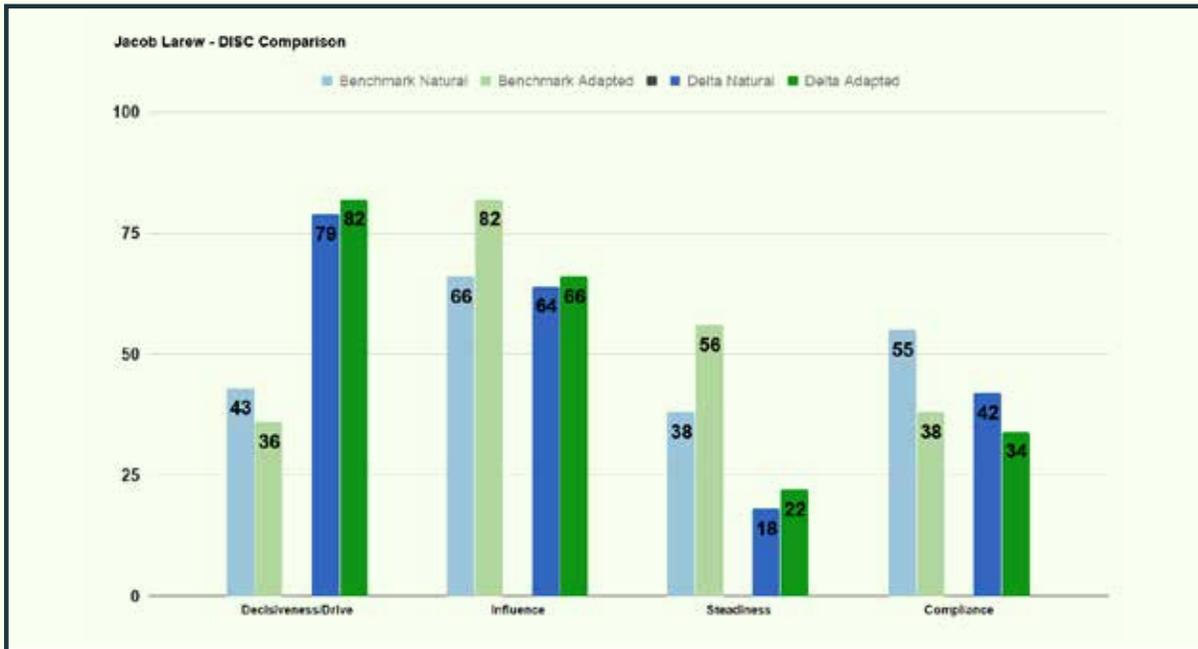
- Leadership Commitment: "I am committed to being an open and confident leader in my ability to achieve excellence."
- Farrar's soft skills and DISC (not displayed) shifted as a result of her being, as she describes, "agreeable by choice" and not "trying to please everyone." She now sources her confidence to problem solve and to drive results instead of waiting for permission and awaiting consensus.



### Joe Krull

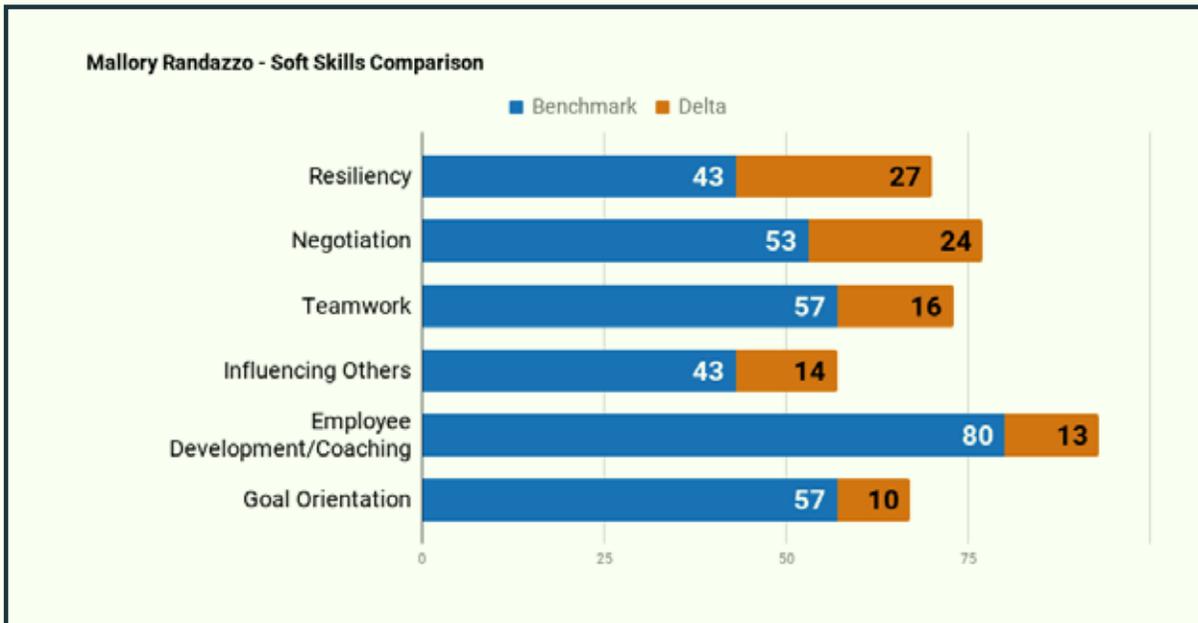
- Leadership Commitment: "I am committed to being a confident and inspiring leader."
- Krull's DISC reflects a shift from a cooperative, hesitant, and steady leadership style to an externally driven style with higher Decisiveness and a greater ability to manage multiple priorities at once (due to lower Steadiness). He materially shifted the soft skills related to his leadership commitment.





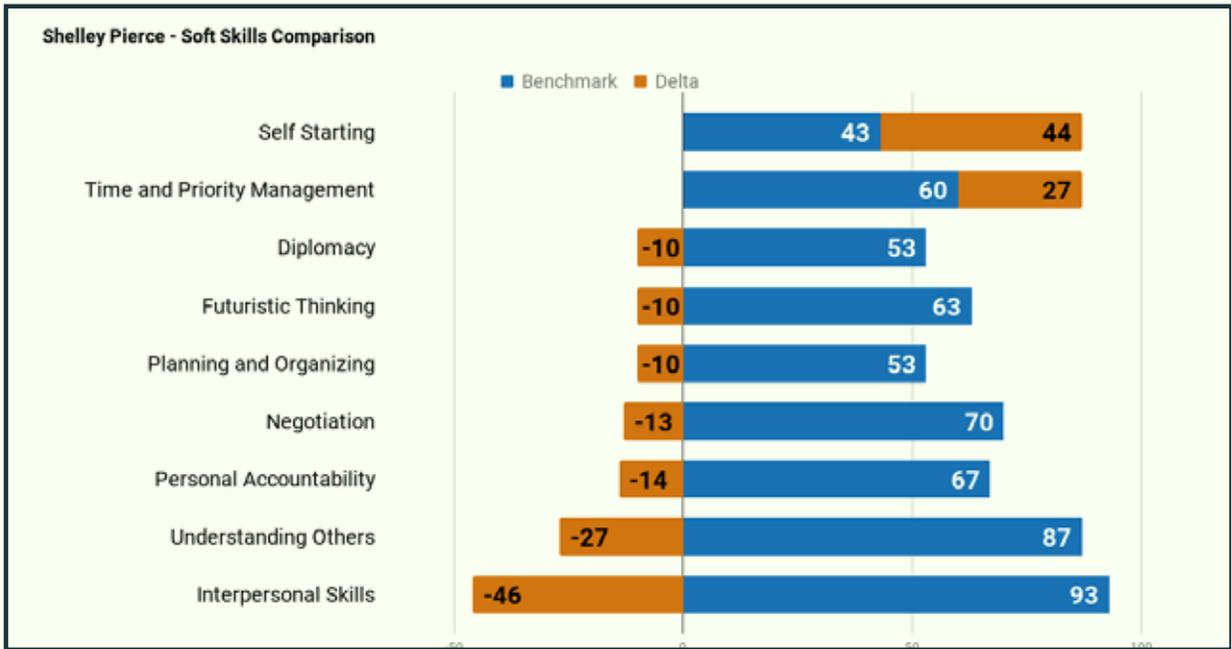
**Jacob Larew**

- Leadership Commitment: "I am a commitment to being a deliberate and patient leader."
- Larew's behavioral profile shifted to be more driven (with higher Decisiveness), more urgent, and more variety-oriented (due to lower Steadiness) as he transitioned into his new role as VP of Retail.



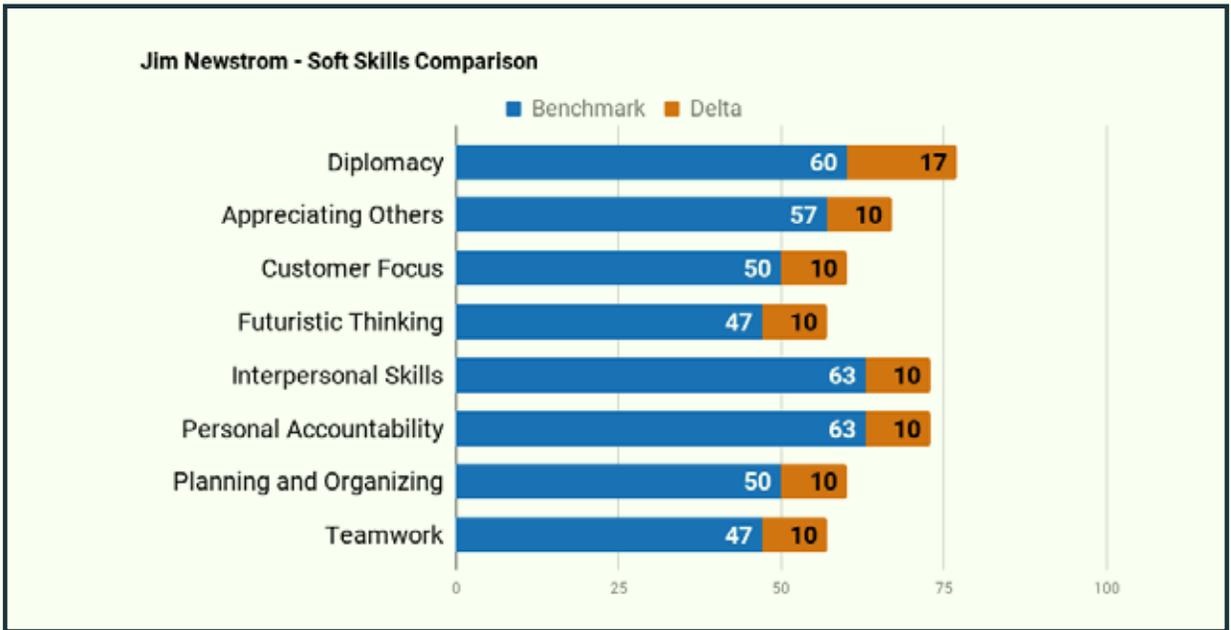
**Mallory Randazzo**

- Leadership Commitment: "I am committed to being a confident leader of change."
- Randazzo broadened her purview of the organization's priorities (using negotiation) and increased her ability to work collaboratively to achieve a common goal.



**Shelley Pierce**

- Leadership Commitment: "I am committed to being a compassionate leader by personal engagement with my teams and staff."
- Compared to before ELP, Pierce is less dependent upon her friendly interpersonal interactions as a way to inspire her team and leans more heavily on being intentional and self-disciplined.



**Jim Newstrom**

- Leadership Commitment: "I am committed to becoming a results-oriented leader fully capable of holding others accountable while inspiring deep loyalty through team development."
- Shifts in Newstrom's soft skills and driving forces (not pictured) allowed him to tap into and leverage his team in a much more



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