

# Building Organization-Specific Knowledge About Key Developmental Experiences

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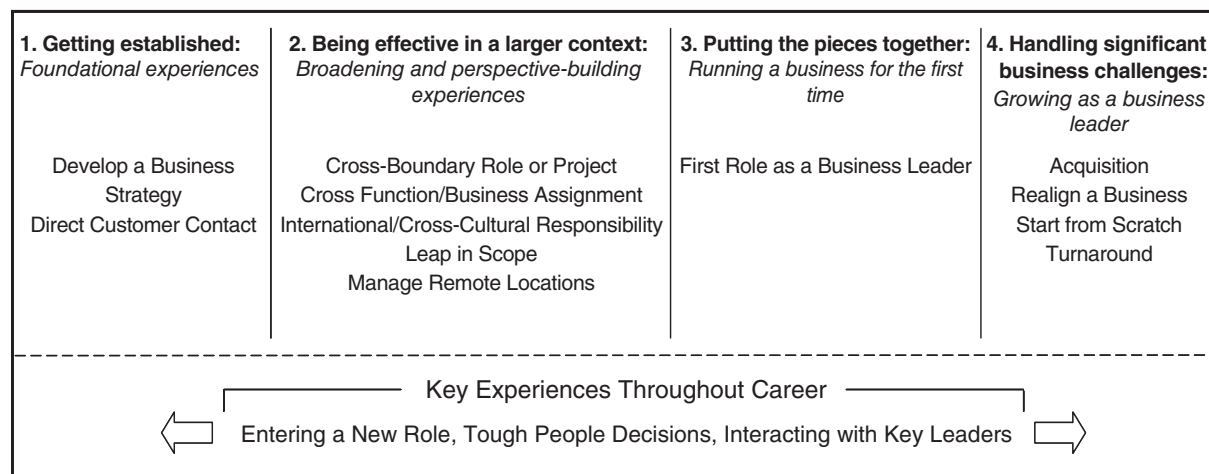
**A**T THOMSON REUTERS, we knew from various needs analyses that it was important to build our bench strength. We also knew that the organization has an abundance of on-the-job experiences in which key skills for business leadership can be developed. Therefore, we launched an initiative to help our current and aspiring leaders take advantage of the developmental potential of these experiences.

Our first step was to create a model of high-impact developmental experiences for our current business leaders. The model was not intended to describe every experience that could be helpful or to say that any particular experiences are required for success as a business leader. Rather, it describes fifteen experiences that leaders at Thomson Reuters found to be highly developmental for them (see Figure 5.1).

Our next steps were to develop multiple approaches for sharing this information with our current and aspiring business leaders. We wanted to have a scalable way to provide guidance to our employees to help them think through their choices about what career challenges to take on in order to develop their skills, and to provide helpful information

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Figure 5.1. Key Developmental Experiences



about how others successfully dealt with similar challenges. We did this by writing a book describing the key developmental experiences in the model, creating a series of podcasts to share the same information, and developing two forms of workshops to help our talent learn how to maximize the development available from whatever experiences they have in their careers.

## Creating the Model of Key Developmental Experiences

We interviewed a representative sample of more than thirty business leaders from across the company, asking them to describe the experiences they found to be the most formative in the development of their general management skill sets. We then analyzed the interview data to create the model of key developmental experiences at Thomson Reuters. Below are the main steps we followed.

*Engage stakeholders.* We shared our plans and goals with the HR leaders in our business units and gained agreement on the plan from the CEO. We also involved a small number of the HR leaders in the project, both for support and to help with buy-in.

*Identify executives to interview.* Two sets of interviews were conducted. One was with the chief strategy officers and CEOs of our major business units, getting their views on the experiences that will be most critical for our future business leaders to have as part of their development. The second set of interviews was with other leaders who were currently successful general managers at a level below the business unit CEOs.

*Invite executives.* To schedule the interviews we sent the executives a short note explaining that we would be looking for time to interview them and briefly explaining what the

interview was about. Closer to the interview date we sent a second e-mail with more information to help them prepare, advising that we would ask them to tell us about the experiences they had found to be most developmental in their careers.

*Interview executives.* Interviews lasted two hours, had two interviewers in attendance, and were done in person when possible. One interviewer led the discussion and the other took notes. The interviews started with the executive providing a brief summary of every job he or she had had. Then we transitioned to gather more detail about the experiences the executive found to be most developmental. For each of the key experiences, we asked questions to understand where the person was in his or her career when the experience had occurred, the key challenges faced, what was learned, and advice that the executive would give to others entering a similar experience.

*Transcribe interviews.* We recorded each interview so we could focus on the discussion with the executive and also ensure that afterward we would have access to everything said. Following each interview we gave the recording to a transcription company that sent us a Word document with the entire contents of the interview.

*Code the transcripts.* Each interview transcript was read by two members of the project team. The reader was to identify all the experiences mentioned during the interview, the challenges faced, and advice provided. The two people who read the transcript then met to compare notes and agree on the final coding of the transcript.

*Enter transcripts in qualitative analysis tool.* The transcripts were loaded into software for conducting qualitative data analysis (we used Atlas.ti); the final codes were entered. Having all the transcripts loaded and coded in a single software tool enabled us to pull the subsets of information we needed from across the transcripts for analysis. For example, we could create a list of all the experiences mentioned and print a document with every quote from the interviews related to a specific type of experience.

*Integration meeting.* The final step was an integration meeting where the team reviewed all the experiences mentioned in the interviews and decided which ones should be part of the final model. Ninety-six experiences were coded from the interviews, so the integration meeting was about reducing that number to a smaller set of the most meaningful experiences. This was done in part by combining the experiences that were coded with different names but were similar (for example, agreeing that “gaining customer insight” and “working directly with customers” could be combined into one experience). Another element of creating the final model was to decide which experiences had the most support in the data. Some experiences were developmental for a few executives but were not included in the final model because they were mentioned less consistently across the interviews.

## Information Contained in the Book

Once the model of key experiences was created, it was time to put that information into a format that could help others develop in their careers. We began by writing a book to

describe the experiences, lessons learned, and advice. We made no assumption that anyone would, or should, read the book cover to cover. It contains an introduction with some overview information followed by fifteen stand-alone chapters, one chapter for each of the key experiences. There is no conclusion chapter.

We wrote the book in such a way that readers can pick it up, flip to the chapter most relevant to them, and find the information they need quickly. We emphasized that point in our discussions about the book, knowing that it was most likely to be used if it was quick, easy, and helpful for the reader. For the same reason, we avoided being highly formal in the book, preferring to use a light style.

The introduction is only six pages long. It describes the value of experience-based development, explains how we created our model of fifteen key developmental experiences at Thomson Reuters, lists the experiences, and provides recommendation for various ways to use the book. Appropriately, it is the shortest chapter in the book.

Each chapter follows the same format:

- There is an introduction defining the experience and listing the key developmental dynamics. That is, it explains what it means to be in an experience (for example, what a leap in scope is) and the aspects of having that experience that made it developmental for our leaders.
- Best practices are cited, as suggested by our business leaders. This section summarizes the recommendations most frequently made by our leaders for others to consider when entering a similar experience. For example, in the experience of dealing with tough people decisions, the recommendations included practices such as, “DO: Look into options for dealing with people who are currently not on track to be part of a team that helps you achieve your objectives” and “DO NOT: Hesitate to remove or change responsibilities for people when it is clear that they are not going to meet the business’s needs.”
- Insights from our leaders are presented. This section contains representative quotes about what made experiences developmental for leaders or advice they would give to others. We used exact quotes to the extent that we could, but we edited them for readability and confidentiality. This is a compelling part of the book because the quotes allow the emotion and reality of the experiences to come to life for the reader. In another example from the experience of dealing with tough people decisions, one quote is, “You have got to make tough decisions. Firing somebody is not easy, but part of being successful is being able to move people out. . . . It’s not just about assessing people; I believe my assessments were correct. Those skills I had. What I didn’t do was move on my assessments quickly enough. My breakdown was not moving on what I knew.”

One of our business units publishes books for professionals, so we contracted to have the book printed internally. We used an external graphic artist to design a cover. These days,

an author could use a service like [logocontest.com](http://logocontest.com) or [99designs.com](http://99designs.com) as a low-cost way to obtain a variety of design recommendations.

## Converting the Book to Podcasts

Our purpose for structuring the book the way we did was to make it easy and quick for a reader to access the content. We knew that some employees would be more likely to review the content if it was in audio format rather than written, so we converted the book to a series of podcasts. The book structure lent itself to this approach because each chapter could be readily converted to a single podcast about that experience that made sense on its own without any additional context. A listener could benefit from any podcast from the book without having to listen to podcasts of preceding chapters.

Appropriately, an internal instructional designer took on the project of converting the chapters to podcasts as a development experience for herself. She rewrote each chapter into a script, so it would sound natural when read aloud, and divided the content into sentences that would be read by three different “characters” in the podcast: a narrator and two leaders.

The narrator read the introduction and such sections as key developmental dynamics, and the two leaders spoke the quotes included in the book. Instead of having a separate section of quotes, as in the book, the podcasts wove the quotes into the other segments of each chapter to help avoid monotony from listening to a single narrator’s voice for too long. For example, in one podcast the narrator said, “When you accept a new position that represents a leap in scope, you must be prepared to become a different leader than you were in the past.” Then one of the leader voices said, “This role was very different in the sense that in both of my two prior roles, I came in on the ground floor, building the business as I went along. Now, all of a sudden, I’m being handed this large group.” The voice of the leader provided color commentary, in the form of our leaders’ quotes, to highlight the main points made by the narrator.

A local talent agency provided the voice talent to use for our three characters in the podcasts. We hired a local recording studio to manage the process of recording the audio and converting it to the audio files needed for the podcasts. For two days the voice talent came to the studio to read their lines. We were there to answer questions and to do rewrites of the script when something didn’t sound right as it was being read.

## How the Book and Podcasts Are Being Used

One of our major office locations hosted a series of “Meet the Author” events in which authors would come to discuss their books with our employees. After our book about experience-based development was printed, we used that series to officially launch the book.

That was nice for us, and everyone who attended received a free book, but that is not where most of the value was derived. The books and podcasts were used more broadly through our intranet and workshops and by our HR business partners.

We created a page dedicated to experience-based development on our intranet. The site contained a variety of content, including general information about learning from experience, video clips of thought leaders discussing experience-based development, and links to the content of the book. Users could see all the experiences described in the book and download either a PDF copy of the relevant book chapter or access the associated podcast. This enabled easy global distribution of the content that could be accessed as users needed it. There was also a link for e-mailing the authors with a request for a printed copy of the complete book, which was given to employees at no cost upon request.

The book content was also leveraged by integrating it into development workshops. For example, our MBA graduate rotation program regularly holds development events for program associates. We created a module to help the associates think about the experiences they've had in their careers and the lessons learned from those experiences and then to assess future opportunities based on the learning they are likely to have from each opportunity. We also created a two-day workshop dedicated specifically to the topic of learning from experience, but the workshop proved to be too much. The content was better received in shorter modules.

Various HR business partners chose to use the book as part of programs they ran. Examples include sharing the book as part of manager training aimed at developing employees, providing the book to all new employees at or above a certain level in the company as a part of orientation, and making the book a topic for meetings of mentoring groups.

## Lessons Learned

As should be the case, we learned numerous lessons in our experience of creating and utilizing the book. In the order of the steps we followed, our advice includes:

*Keep the leader interviews anonymous.* In part, anonymity encourages leaders to be more open about the challenges they have faced and where they struggled. It also helps protect the shelf life of the content. Over a period of time the interviewed leaders will start to leave the company. The advice they gave is still valid, but it can lose some luster if readers know a quote is from a leader who is no longer with the company.

*Record the interviews.* Even with one interviewer dedicated to taking detailed notes, that person would struggle to capture all the comments accurately, and you never know until long after the interview which quotes from a leader you are going to want to use later. The recording is also impartial and does not depend on what an interviewer chose to write down, misheard, or wrote in error during the interview.

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*Use a qualitative analysis software tool.* We used Atlas.ti; others are available as well. Coding the transcripts within the software allowed us to pull quotes related to specific experiences and lessons learned as needed, and to revise the codes readily as our model of experiences was developed.

*Have convergent thinkers in the integration meeting.* In the meeting where the interviews and their preliminary codings are being reviewed in order to create the model of experiences, the task is to synthesize a large amount of data into a smaller set of experiences. Those tasks are more complicated when too many team members are divergent thinkers who are inclined to identify the many ways in which the quotes could be interpreted. It's not that there is only one correct model that could be derived from your qualitative data, but you need to arrive at a single model, and the process can be drawn out if the team members spend too much time exploring all the options.

*Deliver the content in short segments.* It worked well not to assume that the book would be read cover to cover, or that anyone would listen to several hours worth of content about developmental experiences. Our book content lent itself to this format, but with the other experience-based development curricula we developed we also found that trying to cover too much ground at once quickly runs into the law of diminishing returns.

*Create worksheets or other tools.* Our book did not include any worksheets or tools for helping readers think through the experiences in their careers. The worksheets we developed for use in workshops were very useful, and it would have been good to include some version of them in the book. For example, we developed a two-sided worksheet where one side described five steps for identifying a developmental experience for oneself or a direct report, and the other side provided a format for documenting the decisions to be made in each of the five steps.

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