LEAD ON!

E-Leadership:

A Two-Pronged Idea

At Xerox, leadership development is via the Web and about the Web.

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Illustration by Peter Bennett

Leadership

At the Center for Creative Leadership, we've been asking such questions as, What is e-leadership? How does e-leadership differ from leadership? Does it differ at all?

We believe that within the next decade, technology will be so ubiquitous that it will not occur to anyone to add an *e* to the word *leadership*. But at the moment, we're in a transition–a time when technological advances are outpacing the ability of individuals and organizations to absorb them. People are still trying to understand new technologies and how best to use them. Organizations are struggling with technological-integration issues, while employees face a steep learning curve. That transition is creating a tremendous amount of instability and churning in the workplace, exacerbated by the tech wreck in the stock market and ripple effects of September 11.

Early in 2001, Xerox asked the Center for Creative Leadership to create a leadership development program that would address technological and change issues in a practical way. Specifically, Xerox wanted to deploy training more quickly, minimize time away from the job, reduce learning costs, and integrate leading-edge learning technology. In addition, the company needed to keep the leadership pipeline filled with talented and motivated employees. A critical focus was on developing future leaders who could function effectively in a competitive, technologically driven marketplace. That request gave us a great opportunity to put the ideas we've been developing into action.

Technology's impact

Over the past several years, we've been exploring how technology is affecting teams and leadership. Through an alliance with Forrester Research in the fourth quarter of 2000, we surveyed 546 U.S. business leaders across a wide variety of industries and conducted 35 follow-up interviews to learn more about what skills and experiences are necessary to function effectively in a digital environment. We learned that the foundation skills traditionally associated with leadership—such as communication, retention, motivation, direction setting—still apply but are changing. Technology is changing the context in which we work—accelerating ambiguity, the rate of change, and the need to work collaboratively across borders. As a result, many of our assumptions about leadership, teams, and organizations must evolve.

One of our interviewees describes how the context—not the content—of communication is changing: "You have to have great communication skills, but not just verbal skills. You need to also have written and videoconferencing skills.… A few years ago, we brought clients together or mailed things to them. Now we just use email. I'm on the board, and

According to a recent study by the Center for Creative Leadership and Forrester Research, leadership is characterized by these key paradoxes:

Swift versus mindful. When participants at Xerox were asked about the impact of technology on leadership, the most common response was the need for speed. To meet that need, many organizations and individuals make bad decisions because they don't take the time to understand a situation and think through alternatives. **The dilemma:** how to balance efficient, habitual responses with fresh ideas and innovation.

Individual versus community. Technology provides tools that give people a great deal of autonomy. Our survey shows that email is the most frequently used type of communication. Yet, a 1999 study of 6,357 workers by Randstad North America found that the top reason respondents gave for staying with their current companies was affection for co-workers. That happens through face-to-face interaction and shared experience. **The dilemma:** how to create ways for individuals to be autonomous without feeling isolated.

Top-down versus grassroots. Many organizations are still based on a hierarchical structure, and frequently someone

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leadership still apply,

Paradoxes

at the top needs to make a fast decision. A hierarchy is predicated on the idea that someone is in charge, is presumably in control, and has "the answer." The trouble is that many people at the top don't know the answer; in fact, there may not be one. **The dilemma:** how to decide when to use control while increasing collaboration.

Details versus the big picture. The need to manage and prioritize an enormous amount of data has never been greater. Yet to stay competitive, leaders must also be able to link all bits of information together to identify patterns. **The dilemma:** how to sift through a vast amount of data and weave it so that it becomes meaningful.

Flexible versus steady. With new technologies and changing economic conditions, organizations must be able to sense needs and opportunities, adapt, and improvise. Ongoing mergers, acquisitions, alliances, and downsizings mean that employees are frequently working on teams of continuously shifting players. At the same time, workers must maintain a sense of priorities and movement toward a common direction. **The dilemma:** how to maintain focus and purpose in the midst of continuous change.

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we had our last meeting by videoconference. That's a giant step. Technology has changed how we get together and communicate."

In our interviews, we heard leaders speak repeatedly of various paradoxes they face, and the dilemmas that result from them. Those paradoxes aren't new, but they are complicated by new technology.

Based on our findings, we realized that technology represents a complex challenge for leaders. At CCL, Bill Drath and Chuck Palus have been examining leadership and complex challenges over the past eight years. Simply put, a complex challenge is a situation that demands action for which people have no resources for acting. The Latin origin of the word *complex* literally means "to weave together." Complexity can be seen as an embrace of folded, intertwined threads. When confronted with complexity, you're likely to miss much of what's there because so much of it is folded, intertwined, and thus not revealed. A complex challenge confronts you with a fundamental paradox: The challenge demands response and action, but the complexity demands the capacity to pay attention to the nuance. The challenge says that you'd better do something about this now, while the complexity insists that you stop, slow down, and painstakingly unwind the folds.

Essentially, a complex challenge requires immediate action though no precedents, prescriptive solutions, or correct answers exist. Whenever you're confronted with a complex challenge involving a paradox, a call for development arises. Through development, what's paradoxical can be integrated into a larger framework and the paradox can dissolve.

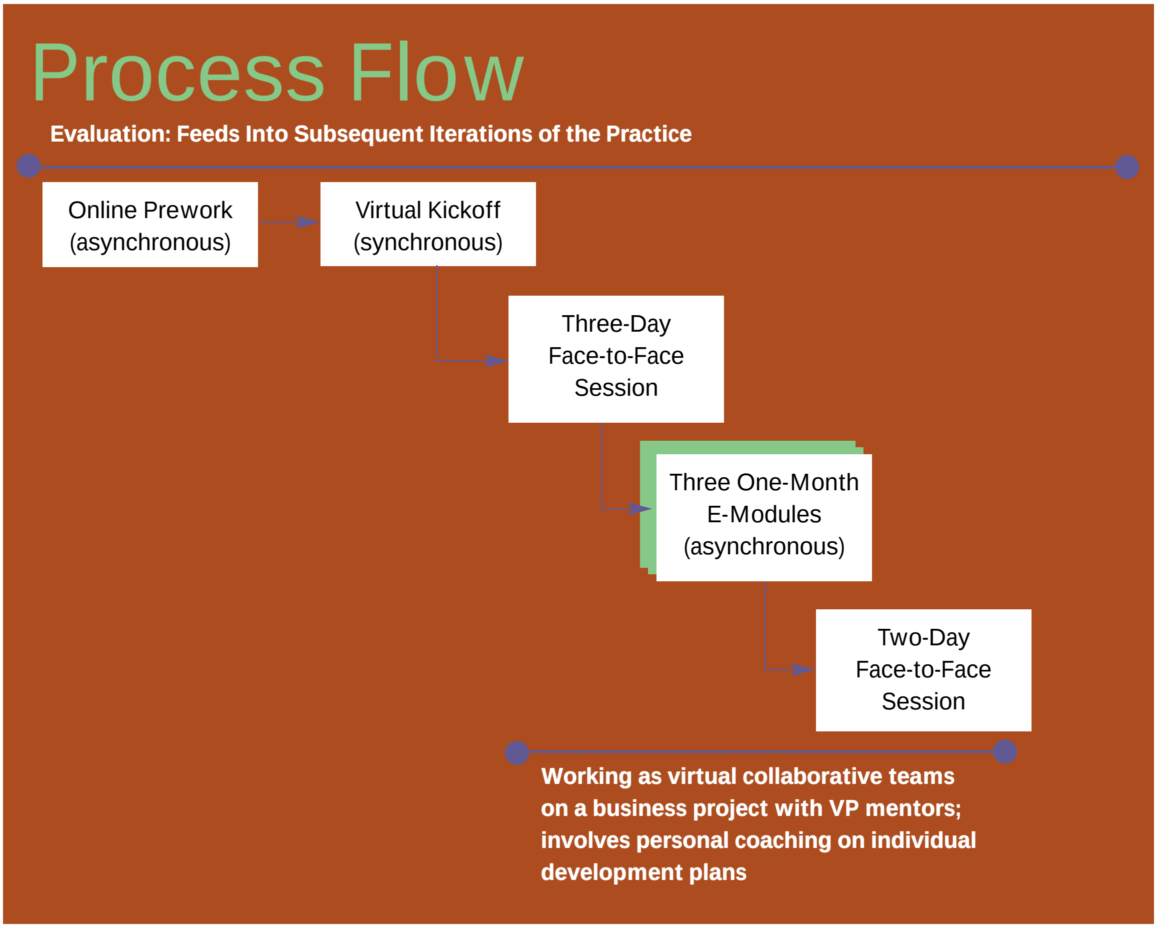
Ideas into action

Working with Xerox, our broad goals were to

- design and deliver a process to improve leadership skills, morale, and retention
- maximize the efficiency of limited resources
- teach leaders how to function more effectively in an online environment.

We designed a blended program for high-potential employees, using face-to-face sessions, synchronous and asynchronous Web-based learning platforms, online assessment, personal executive coaching, and internal mentoring. Probably the most challenging part of the process involved working as geographically dispersed teams over a three-month period. Participants were put into teams and asked to identify, plan, and begin to implement a business project based on the company's strategic initiatives and then present their results to a group of vice presidents at the second face-to-face session, which was the culmination of the program.

Though we delivered a variety of content through the face-to-face sessions and e-modules, we focused on designing a process that would teach through action learning these meta-



Our intent was to **maximize** the effect of learning on participants' job performance and have direct impact on the organization's business goals.

skills: facing complex challenges; leading cross-functional, geographically dispersed teams; and giving and receiving feedback.

The diagram above summarizes the process flow for this program.

Online prework. This involved a variety of activities, including completing individual assessment instruments online (results were received during the first face-to-face session) and posting a brief personal biography, photo, and symbol of leadership in the online workspace.

Virtual kickoff. This synchronous event occurred one week prior to the face-to-face session and was hosted by Xerox's vice president for the North American Solutions Group. The CCL facilitators and Xerox internal program manager introduced themselves and provided an overview of the entire five-month process. They also gave participants an opportunity to ask questions.

Three-day, face-to-face session. This session, which took place at CCL's Greensboro, North Carolina, campus, involved 36 participants who were divided into six teams of six on the first day. The teams were kept intact for the remainder of the program. The session included

- content presentation
- a variety of team-based activities
- a two-hour individualized coaching session to review feedback instrumentation
- guidelines for functioning as a geographically dispersed team
- practice with the online workspace.

Participants were asked to create a leadership development plan that they'd review with their coaches in subsequent telephone coaching sessions.

Business project. Prior to the program, Xerox execs identified company-wide strategic initiatives, such as "increase revenue generation." During the face-to-face session, the teams were asked to identify a business project addressing one of the strategic initiatives, which they could begin to implement within the next three months. They would report their results to a group of vice presidents and other senior executives at the culminating face-to-face session. Because of the initiatives' visibility, the projects were high pressure for the participants.

Three one-month e-modules. Each e-module included an overview, objectives, course content (in the form of Word documents, PowerPoint presentations, online self-assessments, or e-learning courses), and additional resources. Each module also asked participants to complete an individual assignment and a team assignment. For example, one individual assignment asked participants to complete an online assessment instrument, the Learning Tactics Inventory; share their profiles; and discuss the implications of their learning preferences with their teams using threaded discussion. A team assignment asked teams to apply systems thinking to their business projects and discuss the implications.

Team-to-team feedback was structured so that each team provided feedback to another team during each online module. The purpose of team-to-team feedback was to create cross-fertilization of learning between the teams and provide practice in giving and receiving feedback.

Individualized coaching. Two one-hour telephone coaching sessions were arranged so that participants could maintain continuity with the coach they worked with in Greensboro. Those phone sessions were individually scheduled in the same timeframe as the e-modules and provided a chance for participants to practice and discuss leadership goals identified in their development plans.

Internal mentoring. Teams were asked to identify one or two internal mentors (typically vice presidents) who could act as sounding boards as the teams worked on their business projects.

Two-day, face-to-face session. The main objective of this session was to let teams report on their projects to a group of 26 vice presidents and several senior executives. Prior to the reports, the vice president group received training and practice in coaching. Following the reports, several vice presidents were assigned to meet with each team to provide coaching on the project and the presentation, as well as to suggest how to further implement the project at Xerox.

Impact

Our intent was to maximize the effect of learning on participants' job performance and have direct impact on the organization's business goals. We also designed the program to increase learning efficiencies by reducing total costs and time away from the job. We collected formative data by having participants evaluate each component immediately after it occurred, as well as summative data of the entire process after the final face-to-face session. We're administering a follow-up study three to six months after the final face-to-face session, customized to intended outcomes and to provide us with data that tracks changes in participants' behavior.

Learning satisfaction. End-of-component surveys after each phase indicate that participants were highly satisfied overall, learning activities were job relevant, and the knowledge and skills constituting each component's learning objectives were acquired. For instance, 91 percent of participants were satisfied overall with the online prework and virtual kickoff, 100 percent found the first face-to-face session highly relevant, and 90.2 percent found the three e-modules highly relevant. The culminating face-to-face session received a satisfaction rating of 100 percent.

Participants' Comments

"This is a strong team that has worked hard together. The high quality of our business project is the direct outcome of good communication, teamwork, and effort by all."

"During the entire process, the individuals functioned as a team. We did the work together, listened to one another, were open to new and different ideas, and took ownership for our actions. Each member was committed, flexible, and went the extra mile. The team was very effective because our leadership behavior was consistent, and the individuals are truly good and smart people. As a result, our solution can improve our ability to attract and develop employees into Xerox."

"We believe that the business project was designed to be difficult.… It was insightful to understand the issues at hand and prepared us for taking action in the future. Though we feel frustrated in our inability at this point to deliver significant revenue growth, we feel we're better prepared to take action in the future in our joint and individual responsibilities."

"It has been an extremely challenging task to work with people whom we have known for such a short period of time on such a complex assignment. We spent a lot of time getting to know one another—learning each other's strengths and weaknesses and communicating through difficult, single dimensional platforms. Those barriers made it difficult, at times, to move the ball forward."

Our mental models of leadership must evolve to embrace the changes brought about by technology.

Using a scale of 1 (very low) to 5 (very high), participants were asked to indicate how confident they were in their ability to meet the various program objectives. Participants gave the prework and kick-off session a mean rating of 4.09, the first face-to-face session a mean rating of 4.27, and three e-modules a mean rating of 4.09. The final face-to-face session received a rating of 4.23.

Observed behaviors. We observed the following leadership behaviors among participants during the course of the program:

- giving and receiving direct, behavioral feedback to peers, both face-to-face and online
- learning how to complete assignments and tasks as geographically dispersed teams
- networking across functions and levels of the organization
- balancing and prioritizing numerous tasks and demands on their time (the business project was in addition to participants' full-time jobs)
- learning to condense a complex project into a 15-minute presentation to a group of about 65 people, and having to respond to questions from vice presidents and senior executives.

Learning efficiencies. The timeframe and costs for the program were significantly reduced from an earlier version that consisted of 20 days of classroom training over a two-year period. Class time and delivery costs were reduced by more than 60 percent. The length of the program was reduced to five months, and travel time was reduced by 50 percent, with additional savings in lodging costs. Tuition costs were reduced from $12,000 to $5,000 per participant, hotel stays were cut from 20 days to five, and staffing requirements were reduced from two full-time resources to 25 percent of a single manager's responsibility.

Design costs were minimized by repackaging previously used content and activities for online access and application. Ancillary costs, including tracking and shipping, were reduced by using a Web-based learning environment.

Organizational impact. To assess long-term organizational impact, we're tracking the progress of the business projects, the barriers and supports related to the accomplishment of the projects, and the impact of the business projects on Xerox. Results of the projects over the long-term will enable us to track promotion and retention of the targeted population.

Technology is changing the context in which we work—creating an accelerating rate of change, increasing ambiguity, intensifying paradoxes, and causing a greater need for working collaboratively across borders.

Key insights

Some people may question whether it's possible to develop leadership skills through digital technology. Based on our experience, it's possible, but you can't separate e-leadership from e-learning. The way to learn e-leadership skills is to learn how to use digital technology.

We learned that our mental models of leadership must evolve to embrace the changes brought about by technology. On a tactical level, the three meta-skills were the organizing structure for the program.

Technology has changed the context in which we work, and that new context is stretching leaders' capacities by making it increasingly difficult for one leader to do it all.

Narrowing the focus of an organization's strategic initiatives to a manageable scale and scope teaches leaders how to face complex challenges. Teams needed to complete a business project based on the organization's strategic initiatives and complete the project within three months, as geographically dispersed teams with no face-to-face meetings. At Xerox, the geographically dispersed teams frequently chose a distributed leadership model with no defined leader. Five out of six teams responded to the complexity of implementing a business project in three months by having multiple members recognized as leaders. In four of the teams, all or most members shared leadership, taking on different leadership roles for different tasks. One comment: "Each person on the team had a leadership role, depending on the subject matter. No one really took a passive role, and everyone stepped up when it was necessary."

The concept of leadership must be extended beyond traditional views in which individual leaders exert dominance or interpersonal influence, or some combination. Instead, acts of leadership—setting direction, facing challenges, creating alignment, maintaining commitment, and so forth—occur in a community of people as they interact. That suggests leadership doesn't exist only in a single person but rather in a community of people as they make sense together of the challenges they face.

The teams found that incorporating diversity in all forms (functional, ethnic, gender, age, and learning and leadership styles) is important to overall effectiveness. Participants recognized diversity as a strength, again supporting the concept of leadership as a community effort:

"Many of the exercises tested us because the individuals that comprise our team come from different social and professional backgrounds. Those differences initially may have been obstacles, but through the learning experiences at CCL and the time we spent on the project, members were able to realize that different perspectives were improving the results."

Lessons learned

Here are some guidelines for making your e-leadership program effective.

Use an initial face-to-face meeting, and create communication strategies. Nearly all participants agreed that the initial face-to-face session was crucial to their ongoing work as a team. During that session, we used a number of activities to bond the teams, such as self-disclosure and outdoor exercises. On the first day, we gave teams a template for a communications strategy and asked them to work on their strategy in the evenings and post them in the online workspace before leaving the session. During the online portion, several teams discovered that it was helpful to create a buddy system—pairs of team members working together and communicating closely to keep each other motivated and share tasks.

Be explicit about structure and logistics. As designers, we adhered to Malcolm Knowles's principles of andragogy, believing that much of the learning would emerge from participants. Yet, when designing a Web-based learning environment, it's important to be explicit, clear, and more structured than when designing for the classroom. The online workspace requires that participants know where to find the information they need and where to post comments for others to see. Xerox provided teams with a call-in number and password for conference calls. Most teams found the calls useful as a consistent meeting format. Some teams emailed agendas to members prior to conference-call meetings and posted minutes in the online workspace.

Keep teams small. One team lost two of its members during the program and discovered that it was easier to move forward as a smaller team.

It's worth noting that geographically dispersed teams may require more time to get organized and focused. After completing their projects, the teams were asked to reflect on their progress. Five of the six teams said they spent too much time trying to define their projects. One comment: "It has taken us too long to get to where we are today. We were more effective recently as a group. It was too easy in the beginning not to be committed, and I feel we suffered because of it."

Give and receive feedback. We know that many organizations and individuals suffer from an inability or unwillingness to give direct feedback. That's why we strongly emphasized feedback throughout the program and gave participants the opportunity to give and receive it in a number of ways.

Structure feedback into the entire process. In the Xerox program, feedback began at the prework phase with participants completing a 360 degree instrument that included comments from their bosses, peers, and direct reports. The results, plus those of three other self-assessments, were reviewed during the first face-to-face session when each person met with an executive coach.

Participants were asked to observe their team members during the first face-to-face session. On the last day, they rated each team member along the identified leadership paradoxes (see pages 36 and 37). Participants received those results during the second face-to-face session. For each online module, teams were asked to provide feedback to other teams on their online assignments. Online facilitators and mentors also provided feedback to teams. Further, people were encouraged to provide feedback to other team members throughout the process.

Just before the second face-to-face session, team members rated each other a second time along the leadership paradoxes and provided one or two behavioral examples to justify their ratings. At that time, people also responded to questions to provide feedback about their team's effectiveness. That information was completed online and sent confidentially to CCL team facilitators. During the second face-to-face session, people received an individual report that consolidated all comments from team members. Comments were anonymous. In the individual report, participants compared ratings and comments from team members before and after working as a geographically dispersed team. Members also received a team report. Both reports were debriefed during the second face-to-face session. Participants were encouraged to provide honest, genuine feedback in addition to the comments they wrote for the reports.

Create frequent feedback checkpoints. After reading the team feedback reports, several teams said they

Team Communication Strategy

Use this evaluation sheet to help develop your team's communication strategy.
Please complete the following questions as a team while all members are face-to-face, and post the answers on your Emerging Leaders Website.

PURPOSE: What are we doing?

- What will success look like for our team?
- What tasks and outcomes can be delivered in one week? Two weeks? One month?
- How will we identify problems that need attention?
- How we will track our progress as a team?

Suggestion: Each team member may want to post a weekly progress check on the intranet that looks something like this:
None - I did not make progress.
Some - Made progress not visible to others.
Visible - Made progress visible to others.
Results - Took actions that achieved results.
Complete - I completed my goal or task.

ROLES: Who is doing what?

- What are our expectations of each other?
- How will we include each team member?
- What is our strategy for evaluating roles and team members as we go?
- What roles will we need over the course of this project? Who will fill them?

Suggestion: Rotate role assignments among team members over the next three months until the project is completed. Examples of roles:
Manager - coordinates progress of the team
Facilitator - makes sure everyone on the team is participating and contributing effectively
Synthesizer - pulls together and summarizes conversation threads from individuals
Scanner - tracks what's going on in the company, industry, and the world that might affect the project

CULTURE: How are we doing?

- What adjectives (supportive, efficient, fun, reflective, innovative) do we want to associate with the way our team works together?
- What do we need to do to create that culture?
- How will we know how team members are feeling about the experience?
- How will we know that our team is working together in the way we'd like?

Suggestion: Identify ways the team can celebrate success even when it's geographically dispersed.

COMMUNICATION: How will we share information?

- How will we signal each other that we're listening? Confused? Appreciative? Concerned?
- What frequency, style, and length of intranet postings do we think will be most effective to accomplish our project?

Suggestion: Determine in advance what information will be posted in which areas on the team's discussion board for each e-module (such as discussion about tasks, comments on how the team is doing, and feedback to each other). When posting, be explicit about the content in the topic description—for example, "Joe Smith's individual assignment for e-module 1."

wished they'd incorporated checkpoints throughout the process, believing that would've helped them stay on track and air conflicts or concerns about team members sooner. They also realized that completing only one team feedback report shortly before presenting their results represented a single snapshot that might be distorted because it occurred during the most stressful phase.

Teach a behavioral model that participants can practice face-to-face and online. During the first face-to-face session, we taught participants a model for feedback called Situation-Behavior-Impact. Essentially, it involves describing the context for a behavior, the behavior itself, and its impact on someone or the team. The model was used extensively and provided participants with a tool they could practice with and that could be generalized in many ways.

For example, one team decided to use the SBI model at the end of each of their conference calls to review their processes as a team. Over time, it seemed that one team member wasn't pulling his weight, missing conference calls and not following through on tasks. He'd cite competing priorities as his reason. Meanwhile, other team members called in during vacations or rearranged other meetings. Because all members were juggling numerous demands, they became disgruntled with the recalcitrant team member. Even though they were using the SBI model to provide team feedback, they balked at providing direct feedback to this one team member. However, when asked to provide anonymous feedback just before the second face-to-face session, quite a few SBI examples were submitted regarding the errant member's behavior and its effect on the team.

Each team's CCL facilitator received all of the comments; the reports were compiled at the center and were completely confidential. During this session, individuals received reports containing the feedback about their own leadership behaviors (Xerox didn't receive copies) and were given 15 minutes to read their reports. Then they gathered as a team with their facilitator, and each person was given 15 minutes to ask for feedback. The member who received negative feedback asked, "Why didn't any of you tell me this sooner?" Team members struggled with that question. One offered, "You would've felt guilty if we'd said those things to you." The facilitator intervened by reminding members to use "I" statements and that no one could know whether anyone else would feel guilt or gratitude. The member receiving the negative feedback responded, "It's more hurtful to receive the feedback at this point. I would've appreciated receiving it sooner and directly. Now, there's nothing I can do about it in terms of this team."

That became a major learning opportunity. Most team members realized that what prevented them from providing feedback was projecting their own reactions onto the person. They also realized it would've helped the team to provide feedback sooner and said they'd do it differently next time.

The program is demanding. Several participants said after their presentations, "We're tired!" But they were also proud because many Xerox executives were impressed with the leadership potential demonstrated by the group and supported the ideas and work performed by these emerging leaders. The executives also realized they could learn from people who were younger and below them in the organizational hierarchy. The vice presidents were particularly interested in lessons about how to be more effective with digital technology.

Those ideas about e-leadership show that leadership can occur in many ways. In this case, no one was identified as a leader yet nearly everyone contributed to acts of leadership. That was enabled through technology, which links people into a web of information, relations, and interactions that add up to more than any single individual can provide. Who does leadership, how leadership happens, and where leadership occurs within organizations are evolving. Perhaps the greatest leadership challenge that organizations face now is how individuals can work collectively to create a culture that enables all voices of leadership to be heard. TD

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