

# AT C-LEVEL Interviews Ed Ludwig

A conversation  
with Chairman,  
President, and  
Chief Executive Officer  
Edward Ludwig of BD  
(Becton, Dickinson  
and Company)

*The first in a series  
of talks with top-level  
executives on the  
subject of learning  
and performance*

*Interviewed by  
Pat Galagan and  
Tony Bingham*





Edward J. Ludwig became president of global medical technology firm BD (Becton, Dickinson and Company) in 1999, CEO in 2000, and chairman of the board in 2002. He joined the company in 1979, as a senior financial analyst and moved steadily through the company in positions of increasing responsibility in financial management, strategic planning, and operations. In an informal conversation, he shared the following views.

BD has a thriving university to support its leadership development and to help you communicate the company's values and direction, but that wasn't the case when you became CEO. Describe the situation you stepped into four years ago.

**A.** One of the first things I did as CEO was an organizational profile to find out from employees what was getting in the way of BD becoming a great company. We learned that not everyone knew where we were going. And we received a strong message that we had to spend more time developing people. That strengthened my conviction that we had to extend and formalize the development process. Our ability to get where we're going is people dependent, skill dependent, adaptability dependent, engagement dependent.

We didn't want traditional training. We'd been through many cycles of that, bringing in experts from schools like Harvard and Stanford once a year and moving from idea to idea. In the absence of a formal development program at corporate, our businesses around the globe were coming up with their own programs, and some of them were teaching management skills and behaviors that we felt were less than ideal. We wanted to promote the BD Orthodoxy—things BD believes to be true about the way we're running the company

and what we expect from our leaders.

To prepare for BD's next 100 years, we have to develop new skills, abilities, and approaches. And we believed that the best way to do that was through a combination of formalized curriculum, on-the-job training, developmental assignments, and leaders serving as teachers for some of the content. All of this led to the formation of BD University four years ago.

**Q.** Leaders serving as teachers is an important part of the plan. You yourself teach classes several times a year. What makes it worth the investment of your personal time?

**A.** Teaching gives me the opportunity to talk directly to people about where we are going, about our journey to become a great company. Initially, these sessions made me understand that we needed to increase our communication substantially. I began to travel more, to make videos for employees, to hold conference calls, and to send email about our purpose, our goals, our values, and our directions.

In my teaching role, I answer a lot of questions, and that has helped me clarify my own ideas about where the company should be going. I learn from teaching, and I think it has made me a better communicator of our strategies.

Frankly, I don't think the role of teacher is optional for a CEO in today's complex, multifunctional, multinational, technology organization. It's part of the job. And it's a fun part.



## Some of the most powerful training benefits are not measurable.

**Q.** Do you expect or demand an ROI from the programs offered through BD University?

**A.** We debate that extensively here. We haven't yet figured out a way to do a specific return-on-investment, where you get a dollar invested and a dollar returned. However, we look at nonfinancial metrics. The ultimate question is, Is the company being more successful? I believe that the education we do contributes to making the company grow faster, be more profitable, and have higher customer satisfaction ratings.

Our programs have a strong element of personal accountability. Many require follow-up action with a person's supervisor. I tell people, "If you don't have a development program, you have the right to demand one."

In some areas, it's possible to make a more direct quantification of the results of training. We've seen strong improvement in our sales performance. In operations, we look carefully at metrics such as purchase price variances, line fill rates, customer satisfaction, back orders, and other specifics.

Some of the benefits of training are measurable, but some of the most powerful benefits are not measurable. You just have to be willing to live with that kind of ambiguity.

**Q.** You and your chief learning officer have a good and close working relationship. What advice do you have for other CLOs who may be having trouble getting close to their CEOs?

**A.** I recommend that CLOs do as much listening as they do talking. There were many ways we could've gone with leadership development, but Ed Betof, CLO at BD, helped us find the one way that was perfect for BD because he'd worked with us and knew our business. Use your intuition and your ability to assess what's going on in the company. Then go for some early wins.

As CLO, you need to involve not just the CEO, but also the whole leadership team. Also, Ed was frugal with resources when we couldn't afford to add infrastructure, and he was patient. We started with one program, and now we involve hundreds of our leaders as teachers and touch thousands of our associates.

**Q.** What kind of role does the "leader as teacher" program play in recruiting and retaining leaders?

**A.** It's a two-edged sword. I hope it makes people want to stay, but I know it also makes them more attractive to the outside. We just have to compete hard to keep them here. When we recruit, we definitely want people to know that teaching will be part of their success factor. They will be expected to take time to develop people and to get into a formal training mode.

**Q.** What's your opinion of companies that shut down their corporate universities and cut back on training in tough times?

**A.** Based on my conviction that development is important, I've been true to my word that it won't happen on my watch. There's power in hearing from the CEO that, even in tough times, we know where we're going. That doesn't mean that BDU wouldn't take its medicine like everyone else. It wouldn't be exempt.

Every great company has as its goal something far more than just a set of financial objectives. Our goal is to become the organization most known for eliminating unnecessary suffering and death from disease and, in doing so, become one of the best-performing companies in the world. We spend a lot of time thinking about that, and a lot of our teaching helps keep us focused on achieving that goal.

**Q.** Only a small number of CEOs of major companies are as actively engaged in developing employees as you are. Do you see that role as part of your legacy?

**A.** One thing I'd like to be remembered for—at the top of the list—is that on my watch development of people became embedded in the culture. I believe the maxim that a company's only sustainable competitive advantage is the ability to innovate, adapt, and create new value for its customers. I hope that our ability to learn and teach and grow develops its own flywheel and keeps on going. If it does, we will have done something important for the next generation. **TD**

*Reported by ASTD staff **Tony Bingham**, president and CEO, and **Pat Galagan**, director of content.*

In 2000, BD celebrated its 103rd birthday. The year began with our new CEO Edward J. Ludwig assuming office in a carefully planned succession. Ed Ludwig became CEO when his predecessor, Clateo Castellini, retired at the end of 1999. In January 2000, BD was, as it remains today, a proud medical technology company. BD is steeped in a rich history of progressive business growth, and is also known as a concerned and generous corporate citizen. In 2000, BD had maintained its tradition as a company with a strong values system whose associates joined the firm and typically stayed for a long time. Despite that backdrop, our company was facing difficult, uncertain times.

many thousands who preceded us. That dedication and work ethic have never waned and remain embedded in the fiber of our company. That's also true of our strong values system. During the 1990s, a worldwide process that confirmed our BD values was facilitated by BD leaders and high-potential associates involving input from every corner of the BD world. This work distilled BD's rich past and its projected future into four values that every BD associate today understands, and by which we are expected to live at work. The crystallization of these values came from deeply examining how our people interacted and worked over the past century. That information was then blended with a look towards the challenges of the future.

# Leaders as Teachers

By Ed Betof

Like many other organizations, BD found itself competing in an external environment that looked very different from the global health-care world that it had helped shape during the previous century. Markets and regulations were changing quickly, as were customer buying patterns. Our historically strong BD brands were able to only partially fulfill what would have to be a stronger product portfolio to fuel the growth that our shareholders, Wall Street, and our own leaders and associates expected. During 2000, our stock had dropped significantly following results that hadn't met analysts' expectations. Such was the challenge faced by Ed Ludwig and his leadership team. There was much work to be done.

There was also much from which to build. A century of growth was a function of great dedication by the approximately 25,000 current BD leaders and associates throughout the world and the

BD's four values:

- We accept personal responsibility.
- We treat each other with respect.
- We always seek to improve.
- We do what is right.

## Defying gravity

As BD moved through 2000, the good news was that our committed, creative associates and leaders—combined with a strong corporate work ethic, rock-solid value system, and century of incremental growth through products that make a difference in human health—were the building blocks for entering the new century.

However, as is so often the case, a company's habits and history are simultaneously its blessings and its curse. Habits serve organizations, as they do individuals, by making things familiar and usually easier than they would otherwise be. There's an expression that

“gravity never has a bad day.” Left unchecked, organizational habits will gravitate to a comfortable steady state that rarely leads to excellence. These same organizational habits and ways of working are also hard to change, whether or not they serve you well.

The new century would call for BD to do what author Jim Collins refers to in *Built to Last* as “preserving the core while stimulating progress.” We’d have to use the best of our past ways of working—our existing habits—while forming new and better ways to get things done. As a company, we would need to challenge ourselves to change significantly—essentially, to defy organization gravity. We’d need to change those ways of working that were inefficient and burdens to our progress. As we entered this new century, we would be tested. The ability to learn and demonstrate many new and different capabilities would be required of all of our leaders and associates. These fundamental changes in our company would need to take place within a world and competitive environment that had become more complex and more challenging than we had ever experienced.

With that realization, a clear vision and a new leadership platform for the next decade became paramount. New products and marketing platforms had to be developed and successfully launched. Our manufacturing and transactional work processes would need to become much more efficient, leaner, and capable of continuous improvement. New skills, knowledge, much greater speed, and personal and organizational agility had become essential. In some cases, we were ready; in other cases, we were not.

### The Genesis

Several examples will help illustrate the challenge we faced four years ago. Each provides insight into the enormously important, complex, and rapidly chang-

ing talent management demands on our company—whether in new work processes and products, expanded regional growth, emerging technologies, or many other growth areas.

BD leadership committed itself to the global, enterprise-wide Genesis project. This consisted of the design, installation, and adoption of new SAP-based information and work systems that would link businesses, regions, functions, and processes in our company like never before. Among other challenges, this also meant that we were essentially reinventing our supply and value chain processes. We chose to become a process-oriented organization to complement our business, regional, and functional organizational structures. That had tremendous implications for our workforce around the world and involved unprecedented resource, talent, and skill demands within our company. During this same time, BD would pioneer the use of a new generation of medical devices designed to significantly decrease both patients’ and health-care workers’ risk of injury and disease when using injectable products and surgical sharps.

During this period, we were also discovering, developing, and bringing to market a generation of diagnostic instruments and devices that serve the fields of infectious disease, immunology, endocrinology, and oncology. Essentially, we were involved or preparing to be involved in breakthrough or potentially breakthrough technologies in all three of our worldwide business segments.

Advances and future success in medical devices, human diagnostics, the biotechnologies, and life sciences are dependent on many factors. There remains today one common denominator for all of our growth initiatives: the capability of our associates and leaders. That is true in general management, R&D, manufacturing, the supply chain, finance, marketing, sales, and all

of our professional areas. We realized that our growth strategies and our many other challenges would require BD associates at all levels from the factory floor to our senior leaders to develop new skills, abilities, and talents in order to take us in these new and different directions. We needed to be faster, smarter, and more flexible to be successful. The ability of everyone to continuously learn had become a foundational skill for achieving our future goals.

Most important, we recognized that we would need better and more consistently effective leadership. Our approaches to talent management weren’t adequate. Our performance management, recruiting, total compensation, new leader assimilation, and, clearly, our learning and development processes all needed improvement, rebuilding, or even reinventing. From a learning and training historical perspective, BD had a number of fine examples of programs over the years. But we were an organization that had inconsistent learning and training practices that frequently lacked sustainability and were often subject to the ebbs and flows of annual business performance. We also lacked in sharing of effective programs or approaches across business or geographic boundaries. That problem has organizational, structural, and cultural roots. By 2000, there were few tangible remains of the learning and training investments made over the years. Certainly, learning and development wasn’t an effective and institutionalized part of BD, nor could we leverage learning to address our many challenges.

### Three Greats, three strategies

Faced with tremendous challenges and opportunities, in 2000, Ed Ludwig and the BD leadership team formulated the concept of BD’s “Journey to Become a Great Company” and the “Three Greats.” Today, every BD associate from Europe

to Japan, Singapore to Brazil, Mexico City to our corporate headquarters in Franklin Lakes, New Jersey, understands our definition of what makes a great company:

- great performance
- great contributions to society
- a great place to work.

Another key piece of our blueprint into the future involved the formulation of BD's three growth strategies. During 2001, the leadership team developed and began to communicate our three-part corporate growth strategy:

1. Accelerate top-line growth through innovation and development of higher value products for patients and the customers we serve.
2. Improve bottom-line growth by improving operational effectiveness.
3. Strengthen organizational, leadership, and associate capabilities.

Our BD values, the Three Greats, and BD's three growth strategies were core building blocks, for the future. Together with our corporate purpose of "Helping All People to Live Healthy Lives," these building blocks have become our fundamental blueprint for moving forward as a company. They are the company's platform, path, and vision to our future. Everything we do to grow our company contributes to at least one or a combination of the Three Greats and strengthens our ability to execute our three strategies.

Today, BD is a much stronger company. Sales are at record highs. Profitability is strong, our work processes are measurably stronger, and we have an enterprise-wide integrated information data system for the first time. Our stock is more than 80 percent higher than it was at various points in 2000. A key part of this improved corporate performance has taken place under the leadership of Jean-Marc Dageville, our VP of human resources, in the form of greatly improved HR and talent management systems and processes. Day by

day, our organizational and leadership capability strengthens.

### Leaders as teachers

As part of our blueprint for the future, we concluded that in order to achieve our growth goals and strategies, another key part of the puzzle had to be solved. We'd have to become both a learning and a teaching organization. Shortly after I was asked to lead the effort that subsequently would become BD University, I made the recommendation that our primary delivery strategy for live, face-to-face learning be that of BD leaders and associates teaching other leaders and associates. Although we didn't have a precise plan at that time of how we'd go from an organization with an inconsistent learning and development history to a state-of-the-art teaching organization with leaders serving as teachers, Ed Ludwig and the leadership team supported the strategic, directional recommendation to do so. As we began to build BDU, those of us directly involved in figuring how to become a teaching organization committed ourselves to bringing that to reality.

There were several reasons we believed leaders serving as teachers was the right approach for BD. One particular influence was Noel Tichy, author of *The Leadership Engine* and *Cycle of Leadership*, who wrote:

"We have looked at winning companies—those that consistently outperform competitors and reward shareholders—and found that they've moved beyond being learning organizations.... That's because teaching organizations are more agile, come up with better strategies, and are able to implement them more effectively.... Teaching organizations do share with learning organizations the goal that everyone continually acquire new knowledge and skills. But to do that, they add the more critical goal that

everyone pass their learning on to others.... In a teaching organization, leaders benefit just by preparing to teach others. Because the teachers are people with hands-on experience within the organization—rather than outside consultants—the people being taught learn relevant, immediately useful concepts and skills. Teaching organizations are better able to achieve success and maintain it because their constant focus is on developing people to become leaders."

The BDU concept began to form in December 1999; three months later, the first live BDU program was conducted. In its first four years, 10,000 BDU seats have been filled in live programs offered around the world. Approximately 450 BD leaders have been certified to teach in programs in one or more BDU programs in either our leadership, business skills-operational effectiveness, career development, or sales colleges. Additionally, many other leaders and associates are preparing to teach. Virtually every member of the BD leadership team teaches in all or parts of BDU programs. In addition, many other leaders and associates teach in programs or less formal settings that aren't part of BDU, with high technical or strong functionally specific content. Of vital importance, we've seen a major shift in the number of leaders who now think of themselves as leader-coaches and who are coaching and teaching every day. Their words:

"BDU has quickly evolved into the primary learning opportunity in our company. It brings a unique approach that can effectively educate BD associates on the company's key leadership and management expectations dealing directly with the behaviors and the performance factors that create successful careers. At the same time, each participant is immersed in a learning space that also focuses on his or her individual strengths and opportunities for personal improvement. If you

actively participate, and BDU is participative learning, you'll leave with a clear idea of what it takes at BD to do well and a full set of ideas on how you can get there. Our associates now recognize that. As a leader-teacher, this creates a high-energy engagement process and a positive way to partner in the personal development of others," says Bill Kozy, president of BD Diagnostics.

Says Gary Cohen, president, BD Medical, "I've had the opportunity to participate in three sessions of BD's leadership development program as a teacher. I can personally attest that the participants gain significantly from having senior leaders in the company participate as teachers. Among the benefits to the participants are the opportunity to get to know their leaders in a more personal way, the ability to learn how leadership development principles can be applied in a manner consistent with the company's culture, and insight on current priorities and future plans. I'd also say that an even more meaningful benefit is that when leaders participate as teachers and join our leadership development courses for a full three days, it makes participants feel important and appreciated. Many are surprised that our highest-level (and often busiest) executives would stop their other activities to devote so much time to associate development.

"Personally, I've gained from these sessions in large part based on the opportunity to get to know many of our associates in a deeper manner than would occur in the normal business environment. That enabled me to gain insight on people who might have significant future leadership potential, and provided a means to sense the pulse of the organization at the time of the development sessions. The company benefits in many ways, not the least of which is the opportunity to humanize our senior leaders and establish a more direct connection between people at different levels of the

organization. BD also greatly benefits from the direct transference of knowledge and insight regarding its culture and business priorities. In addition, this approach enables an educational experience that's highly pertinent and directly based on the goals of the organization. It clearly overcomes the tendency for classroom style instruction to be theoretical rather than practical."

"I'm often asked why I dedicate three full weeks a year to BD University, particularly the leadership development program," says John Hanson, president, BD Europe. "Europe is a growing and exciting region. We have more than 5000 associates engaged in helping us become a great company, stretching from the Nordic countries to Africa and from the U.K. across to the Middle East. Developing and growing talent, let alone communicating and implementing our strategy, in such a diverse and multicultural region can be a formidable challenge. I find the opportunity to bring together associates from different countries and disciplines, and at different developmental stages of their career, in a focused leadership developmental program to be an effective catalyst. The individual interaction around learning and development is a powerful and motivational mechanism to grow our key people. It's also a two-way learning process for me, and provides a unique opportunity to sense the future potential for leadership roles."

### Teachers learn, too

*No one receives more than the giver. In the BDU faculty role, my colleague-students have taught me volumes about how to become a better team member and leader.*—Ed Gillen, vice president, advanced drug delivery, BD Medical

When we began to determine how we would create and build BDU, we took the advice in Jim Collins's book, *Good to Great*. One of his principles is first who,

then what. It was clear to us that determining who should teach would need to be one of our first steps in establishing BD University. Very early in the process, we set our sights on having BD leaders and key associates be our primary facilitators and teachers. We felt that teaching in one of our four colleges within BDU would improve the leadership practices of those teaching. In addition, because the programs deal with BD strategy, content, and topics, leader-teachers and participants become more familiar with BD issues in ways that wouldn't otherwise occur.

When leaders prepare to teach, an increased self-awareness takes place. Self-awareness is the basis of self-improvement. When leaders teach, they frequently are involved in topics related to corporate, business, or regional strategy, as well as career and leadership development of themselves and others. Their increased attention to those areas often helps them apply what they know and what they teach to their own areas of responsibility. Said simply, this practice helps us solve business problems.

By co-teaching with others, and essentially all BDU programs are co-facilitated, leaders come in contact with other leaders in ways that wouldn't naturally occur. This internal networking frequently helps in sourcing help and expertise when dealing with real work outside the classroom. Teaching provides a natural forum to work on our talent management and development challenges. Says Frank Guido, vice president, US medical surgical, BD Medical, "I feel that the managers in my organization are developing and strengthening their management skills through BDU. They're also becoming better coaches and mentors. As for myself as a teacher, I'm enjoying having this venue to pass along the experience that I've gained over the past 26 years at BD."

We believed we could establish a comprehensive "global leaders as teachers"

process because of certain principles we embraced from the applied behavioral and organizational sciences. The work of several thought leaders influenced us, including Bernard Haldane, Noel Tichy, Jim Waldroop, Tim Butler, and John Kotter.

Haldane was a behavioral scientist and a pioneer in the field of career development, career transition, and job search. He was employed by the U.S. government in the 1940s to help soldiers returning from WWII make the transition into new careers. Haldane developed breakthrough approaches in the area of personal strengths identification and utilization. He also determined why people are willing to go out of their way to help and advise others when they're seeking advice. In so doing, he crystallized the fundamentals of much of the current methods of job search, networking, and the field of career management. At the heart of Haldane's work was the belief that people will share their expertise and help others for two primary and universal reasons: One, because most people are good-willed and wish to help others, including in their careers. Two, most people are flattered and their own sense of self is enhanced when asked to share their expertise and experience with others. We believed that those principles were universal and could be applied if we asked leaders to teach or learn to teach in BD University. Our confidence in Haldane's principles has been rewarded hundreds of times as we've implemented our BDU leader-teachers recruiting strategy. But those principles alone wouldn't be sufficient. We'd also have to draw on others' insights.

Noel Tichy, a professor of organizational behavior and HR management at the University of Michigan and an influential organizational leadership consultant, has produced seminal work on the importance and nature of teaching organizations in a number of texts and articles, including "The Teaching Organization" in *T+D* in

March 2000. His work in such books as *The Leadership Engine* and *The Cycle of Leadership* helped us create the conceptual frameworks from which our leaders-as-teachers approach could be explained and justified to BD's senior leaders. From Tichy's work, we also learned about the importance of "leadership teachable points of view." Tichy's idea is that leaders have strongly held beliefs about many important topics essential to business and leadership success. He says that leaders need to be prepared to communicate these points of view in believable ways through word and action. In our BDU programs, we encourage our leaders to do just that.

Jim Waldroop and Tim Butler, social scientists and psychologists specializing in career development, have roots at Harvard University, where they served as co-directors of the Career Development Center of the Harvard Business School. Butler has remained in that role. Currently, Butler and Waldroop team as consultants in the areas of career assessment and development. We learned from them about "deeply embedded life interests." We applied that in a way that reinforced our belief that if we built it (the BDU leaders-as-teachers approach), they would come. We believed a substantial number of leaders and associates would come to teach, in part, because of what we now refer to throughout BD as "DELIs," or deeply embedded life interests.

Waldroop and Butler wrote about DELIs—naturally occurring and emotionally driven passions—in their article "Job Sculpting: The Art of Retaining Your Best People" in the *Harvard Business Review* in September-October 1999. They outlined eight fundamental DELIs that typically occur in different combinations and with different levels of intensity in individuals who choose to work in businesses and certain other types of organizations. Waldroop and Butler describe DELIs: "Think of a deeply embedded life interest as a geothermal pool of super-

heated water. It will rise to the surface in one place as a hot spring and in another as a geyser. But beneath the surface—at the core of the individual—the pool is constantly bubbling. Deeply embedded life interests always seem to find expression even when a person has to change jobs or careers for that to happen."

We found that many BD leaders have pent-up energy to teach, facilitate, coach, and serve as role models. This desire to teach related to one or likely several of the DELIs. BDU became a natural venue for expressing leaders' teachable points of view and to utilize their "geothermal" energy to teach. When we built BDU, in part upon the leaders-as-teachers concept, hundreds of leaders found a viable outlet in BD, thanks in large part to what we learned from Haldane, Tichy, Waldroop, and Butler.

The writings of John Kotter, a former professor at Harvard University, have also affected our overall approach to building, executing, and sustaining the leaders-as-teachers approach. In *Leading Change* and *the Heart of Change*, Kotter describes eight classic mistakes and eight immutable steps in effectively implementing organizational planned change. His principles have helped us in many ways, but especially in the areas of building support and guiding coalitions, gaining early wins, and creating a sense of urgency. Kotter's admonitions to not declare victory too early continue to ring true for us.

Guidance and support from our CEO Ed Ludwig and his leadership team's first discussions about the formation of BDU through today have been essential to any success we've experienced to date. Their continued direct involvement and counsel have ensured strategic and goal alignment, provided a constant flow of their own leadership points of view, and helped us stay at sea level in terms of keeping our programs practical and reality based. Nothing speaks with greater volume and impact than having members of our own



corporate leadership team, the chairman and CEO, the worldwide business presidents, the CFO, general counsel, regional presidents, and each of our global functional and process leaders directly involved in different BDU programs. Noel Caffrey, BDU regional director in Europe, describes it this way: “Our policy of leaders as teachers not only captures the experience and knowledge of our leaders in BDU programs, but also critically creates a platform that allows leaders to demonstrate real and visible support for the work. It’s the old story: If the boss says and acts as if it’s important....”

### Ways in which leaders teach

There are dozens of ways we involve leaders as teachers. Most come from our worldwide BDU core team; others have come from leaders and associates throughout the company.

Here are some examples.

- co-teaching the primary parts of a program (teachers rarely teach alone)
- lunchtime speakers around the theme of the program or by teaching “The BD Orthodoxy” (values)
- speaking and teaching about personal leadership points of view
- facilitating peer coaching-peer teaching; leaders coaching participants
- teaching and coaching offline during programs (informal teaching moments during breaks, meals, social time)
- leaders being interviewed by another facilitator or group on a topic
- real-time facilitation or commentary or coaching of implementation or action plans as they’re described in small or large group settings
- facilitating or speaking at “town meetings” during sessions
- tackling tough “parking lot” issues in class
- teaching by “schmoozing” during a program (getting a message across by informally interacting and building relationships)

- using media such as pre-taping, video-conferencing, or other electronic means to communicate key messages, examples, and so forth.

### Preparation, development, follow-through

“The challenge for most of our associates is the willingness to take a risk and teach others, some for the first time. They soon learn that it’s much harder than they thought. The most helpful and affirming response from the university’s perspective is to ensure that leaders as teachers are supported. We do that by providing train-the-trainer sessions for each class, partnering inexperienced individuals with more experienced ones, pre-training planning meetings with co-trainers to clarify roles, and debriefing sessions after each class to provide suggestions and improvements. The reinforcement makes a difference in their continued participation,” says Sharyn Mosca, senior business partner, leadership and development, BDU.

Here are some principles:

- Involve leaders in program design teams and subsequent teaching teams.
- Co-lead the development of a new program or to update a program.
- Serve as subject matter experts working as resources for a live, virtual, or global design or teaching team.
- Serve as sounding boards and feedback providers for continuous program improvement efforts of programs.
- Advise on selection of vendors, then teach in In-Licensed programs.
- Participate in new program development “Shake Downs,” a half- to full-day comprehensive review of content and instructional methods usually conducted four to six weeks prior to piloting a new program.
- Participate in ongoing silo-busting behavior—“Swap and Share/Import.”
- Export our organization’s best learning ideas; “Swapping and Sharing” has now become a BD norm, and an expect-

tation as a way to rapidly spreading practices and programs throughout the company.

- Coach direct reports and others’ implementation, execution, or development plans following a program.
- Reinforce key messages following the program (live or technology enabled), including saying the right things at the right time or providing a “booster shot” to reinforce earlier or ongoing learning.
- Train less-experienced trainers.
- Actively participate in the identification of organizational learning needs and development of plans to address them.
- Participate on BDU’s worldwide core team or BDU business, regional, or functional teams.

### Day to day

Day-to-Day coaching—in all directions up, down, and across—involves modeling of personal leadership points of view.

- Identify and leverage “learning-teaching moments.”
- Teach and communicate through addressing and uncovering organizational needs.
- Talent scout and recruit other leader-teachers and facilitators.
- Use organizational surveys and sensing information as a catalyst for communicating and teaching about real work and real issues.
- Facilitate “strategic or organizational profiles”—a process by which we use well-trained BD leaders and selected individuals viewed as having high potential to facilitate a structured process that results in the identification of strategies and plans essential to that part of the company participating in the profiling session.
- Facilitate new leaders and teams “onboarding” or assimilation processes and tools.

We try to make turning leaders into teachers easier rather than harder, administratively hassle-free, and valuable, engaging, and rewarding. Here are a few themes

we've developed that help fuel the leaders-as-teachers concept.

**Senior leadership commitment,** support, and involvement make everything easier. Initially, that had to be earned in BD as it has to be in every organization. Earning is essential; re-earning it every day is equally critical—a lesson we in BDU emphasize with ourselves daily.

**“Every experience is a successful experience” is a fundamental principle.** If an experience is successful, personally rewarding, and enjoyable, leaders come back to teach again and again.

**Carefully match individuals to situations.** We use different progressions and forms of preparation on a highly individualized basis.

**Play to strengths and interests.** We form teaching assignments around each leader's strengths, experiences, DELIs, previous teaching successes, level of comfort, and readiness to handle small to large parts of programs.

**Train the trainer.** We use a wide range of train-the-trainer experiences and programs, ranging from a fundamental Developing Trainer Skills program to content-specific, train-the-trainer processes. As appropriate, we use one-to-one coaching to prepare leaders, usually by the program champion or leader-facilitator.

**Hassle-free administration.** Administratively, ensure things are “Marine boot camp tight”—Ed Ludwig's words of advice as we began BDU. We try not to bother leaders with distractions and administrative tasks that take up their time and make the experience unrewarding or unenjoyable.

**Involve key stakeholders and interested leaders in early and continuous program development.** A high standard of program content and instructional design processes is essential to keep leaders engaged. The more their input is sought, considered, and utilized, the more they feel ownership of the program.

**Develop excitement through successful**

**pilots.** Word of mouth is our primary marketing tool. Our mantra is “under-promise and over-deliver.”

**Constantly recruit.** We conduct constant recruiting in obvious ways. In fact, we call it, “shameless recruiting.”

**HR planning is critical.** We link leaders as teachers to HR planning and identification of leadership potential. This year, we added a check-off box to the individual leader HR planning profile to make transparent whether an individual is serving in some way as a leader-teacher.

**Create facilitator guides.** We take great care to document and maintain easy-to-use facilitator guides. They make the preparation of leaders to teach easier and are designed to help in the minute-by-minute facilitation of a module or program, while leaving considerable room for individual style and customization.

**Certification and feedback.** We pay a lot of attention to the train-the-trainer certification process. We've also established useful and healthy norms about peer planning and feedback before, during, and after programs. On rare occasions, we “decertify” someone who has labored in his or her teaching efforts. Ongoing coaching of leader-teachers for continuous improvement is our rule of thumb.

**Flexible teaching.** We've structured flexibility in instructional modes, which allows for quite a bit of individuality in “working the edges” of how certain topics are taught. We've found that some of our most creative, effective ideas have come from leaders teaching with new and different facilitation ideas.

**Learn from experience.** We pair experi-

## Eight Take-Away Lessons

Here are several crucial actions to ensure a successful leaders-as-teachers approach.

1. It's important that the chairman and CEO and leadership team be involved and supportive.
2. Emphasize the value of teaching-learning as part of the criteria related to leadership potential.
3. Use a change-leadership process (Kotter's eight steps) for long-term sustainability.
4. Develop “Big Mo” (momentum). Worry little about resistance, and focus on those who want to be involved. Enough momentum always trumps resistance. People like to be part of successes and to be where positive things happen. Momentum and involvement beget more momentum and involvement. At some point, they become the norm and part of the culture.
5. Make teaching valuable, engaging, rewarding, fun, and hassle-free.
6. Maintain strategic and business goal alignment. Our programs all have a common purpose: to grow the business and our people.
7. Maintain a strong link between classroom and real-work application. All of our teaching is in the form of active learning with application to participant responsibilities
8. Make leaders as teachers cost-effective. Leaders often learn as much as, and sometimes more than, the participants.

enced trainers with less-experienced trainers, and we match the complexity of a topic to the experience and confidence level of each leader-teacher.

**Preparation is key.** We conduct pre-game preparation meetings to ensure that programs get off to a good start.

### Recognize and celebrate leader-teachers.

This ranges from personal thank-yous to notes of recognition and periodic thank-you luncheons with small gifts, such as a cutting-edge book or CD.

### A learning, teaching, coaching culture

Our leader-teachers say, “I’m a better leader after I teach.” One, Steve Sichak, BD’s chief information officer for several years and now VP in BD Diagnostics, summarizes his leader-as-teacher experience: “One benefit is access to direct, honest feedback about the company’s strategy and performance and the opportunity to integrate that feedback into my thinking, which helps make me a better leader.”

Jay Glasscock, VP of operations at BD Biosciences in San Jose, California, says, “Each time I teach a BDU class, I’m reenergized to lead and reminded of the potential that lies within all of us when intellectually challenged. The dynamic that is created between leader as teacher and associates in our BDU classroom is unique and can’t be re-created in the meeting room. It provides a rare opportunity for me to personalize my approach to implementing our strategies and, most important, gives associates a chance to challenge this thinking among peers. Once ignited by a debate, and with the proper nourishment by the teacher, we collectively move our thinking to a new level. The conversation then moves from the classroom to the work environment, where more informal teaching and coaching occurs and we begin to tap our ultimate potential for real leadership.” **TD**

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