

Table Manners

You've finally been invited to take a seat at the executive table. How should you behave in order to be successful? Hint: It has nothing to do with keeping your elbows off of the table.

By Pat Galagan

TOM IS DIRECTOR of learning at Apex Industries. A superstar, he's just been promoted to chief learning officer, reporting directly to the CEO of the company. He's coveted this role for a long time and doesn't want to come across as the wimp from the training department.

At the first meeting of the executive council, he confronts another member of the team about her lack of understanding of a learning management system. At the second meeting, he's assertive about an agenda item related to the company's older workers, spending minutes lecturing the others on adult learning theory before the CEO cuts him off. At the third meeting, during a discussion of the budget, he makes an aggressive case for measuring participation in class as an indicator of performance. You know how this story ends: He's not invited back.

Many a talented training professional has made the leap from running the learning function to helping steer the organization as part of an executive team. But many more have not made the transition successfully, even when they were sure they were ready. David Dotlich, author of *Leadership Passages: The Personal and Professional Transitions That Make or Break a Leader*, estimates that 20 to 30 percent of chief learning officers are kicked off of the executive team or fired from the company, and that nearly 50 percent waste their time at the power table by failing to make a

real contribution to the business.

"Be a businessperson first and a learning expert second," advises Dotlich. "A lot of people believe that their job as a CLO is to represent learning, when in fact it is to represent the enterprise." He counsels CLOs to identify the strategic success drivers of the company and then link their language and ideas to them.

Ed Betof, CLO at Becton Dickinson, and author of *Just Promoted*, concurs. "See yourself as a businessperson who has learning and development and performance improvement capabilities. Ask yourself how they add to the long- and short-term objectives of the company."

To learn the business when she moved into an executive role at American Express, Jeanette Harrison secured a finance coach to help her understand how the company makes money. Together they covered cost and revenue generators and what elements drive both of those. "It was key to my understanding the business," she says. "It not only helped me know how to position my requests for support but also to understand the challenges facing the business."

The curtain is up

On an executive team, "it's always showtime," warns Betof. He's seen new executives fail because they lacked a high-enough level of self-awareness. "Be conscious of the brand and the reputation you're creating. First impressions are created in seconds and 80 percent are never changed."

In a high-pressure environment like an executive team, it's easy to assume that a display of strength is needed, especially in a company in which training and HR are viewed as soft because they are concerned with people and their be-

havior. Under such circumstances, Betof advises CLOs to "watch out for your dark side. Strengths used to excess become weaknesses and liabilities. A firm decision maker can seem autocratic and unable to take counsel." Under pressure, many a new executive presses too hard on the accelerator without realizing it. "But everyone else sees it," says Betof.

One of the biggest derailers of new executives, according to Dotlich, who counsels many of them, is a deadly mix of "insecurity with a desire to prove." Anxiety translates into false bravado, which comes across as arrogance. "You act as if you know more than you do.

"You really must balance the behavior of offering ideas with the behavior of taking in ideas and listening to others," he says. Caught between those two roles, some executives fail to step up enough, while others, particularly extroverts, overwhelm their colleagues with ideas.

"Never overpromise," says Betof. "That can set you up for underdelivering on expectations." He notes that new executives can get caught in what he calls the "newly appointed leader dilemma." Unlike years ago, when there was a honeymoon period, today's newly appointed leader faces high expectations for results combined with low patience starting on day one.

Other behaviors that can bring ignominy to a new executive include passive resistance, blaming others, and failing to take responsibility for mistakes, cautions Dotlich. Behavior at either end of a "normal" spectrum is dangerous. "Being melodramatic is a derailer," he says. Despite what you've seen on *The Apprentice*, in the boardroom it's not a good idea to put on a show or dominate by calling attention to yourself.

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Derailers are present in all executive teams, which, after all, are made up of human beings. But to gain an advantage, Dotlich advises new CLOs to recognize their derailers by looking back at times in their careers when a certain behavior sent them off track. “Knowing your derailers will help you keep them in check when you’re under stress or pressure,” he says.

Culture cues

Besides knowing yourself, it pays to know the implicit rules of the culture, says Dotlich. “Equally important is to decide if you’re going to honor them or violate them.” Betof takes knowledge of the culture a step further: “Have an explicit learning plan in place for yourself concerning the cultural and performance aspects of the organization,” he says. “This is a time to model what the profession preaches. Put yourself in accelerated learning mode.”

For women executives, especially those working in male-dominated industries, “it’s important to understand the culture and to adapt where appropriate and necessary,” advises Harrison. “Having that sense of chemistry is almost more important than anything else. Look, listen, and learn is the best advice I can give to someone entering the executive ranks.”

When making the move from a director of learning at Intel to a vice president at American Express, Harrison took the advice of an executive coach to let people see her human side. Self-described as direct and business-like, she made a point of telling employees about her family and her five horses and four dogs.

It’s interesting, notes Dotlich, that CLOs who are often experts on cognitive learning can’t apply that to their own self-awareness. “As a CLO, you have to represent a point of view about learning, but you also have to embody it. You are a symbol of learning and its value.”

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The First 90 Days

The first three months of a new job are often like being on reality TV. Your new boss will be watching for the strengths that made her appoint you in the first place. Your allies will be rooting for you and maybe cutting you some slack, while your opponents may be hoping to see you slip. Here is some advice for that critical period.

Confirm the few key objectives expected of you by the person or team to whom you are reporting. Find the two or three things for which forgiveness will not be granted if you fail to accomplish them and then make sure you deliver. On time. As the job grows more complex, you’ll be tempted off course. Don’t go there.

Begin to create strong stakeholder relationships right away; they are vital. Make relationships in all directions: up, down, and across the organization. Everyone leans naturally in one direction over another, so pay attention to those you might be inclined to neglect.

Don’t mistake your allies for confidantes. Master the strategic imperatives of

the business and learn the language of the particular tribe you’re traveling with. Reach out to people with influence in key functions or people from whom you can learn the business. If necessary, get a finance coach.

Understand where your successor shone and where he or she tripped up and why, if you’re not the company’s first chief learning executive.

Help others. Don’t focus exclusively on your own dilemmas in the learning function.

Pay attention to the dress code of your company and industry. In a California technology company, jeans may be de rigueur. But in the financial services world in New York City, suits are the norm. A sartorial misstep can label you as a rebel or a person with no social antennae. Neither will advance your career.

Behave like the leader you are. Articulate a clear point of view and a theory of how learning should work. If there is resistance, decide what you can do to influence the action.

Take a deep breath and have some fun.