



TRAINING AND DEVELOPMENT
INSTRUCTOR'S MANUAL

SRM[®]

SOCIETY FOR HUMAN
RESOURCE MANAGEMENT

Developing a Leadership Strategy:
The Case of the Toy Research Society

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Please note: All company and individual names in this case are fictitious.

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Case Synopsis

This case encourages students to consider organizational development needs when creating a leadership development philosophy and an associated leadership development design.

The Toy Research Society (TRS), a nonprofit organization, has been in existence for more than 70 years. The organization's mission has remained the same during this time, but the membership, the use of the Society by nonmembers and the competitive landscape have changed substantially. Driven primarily by a board of directors and regional volunteer leaders, the Society has never had a formal leadership development philosophy. Now, the long-time president has retired, and TRS leaders are reflecting on how to prepare for the future, especially with increased calls for leadership role clarity and more delegation of work to members. As a member, you have the opportunity to develop the needed leadership strategy.

TARGET AUDIENCE

This is a scenario-based case study with an optional exercise. It is intended for upper-level undergraduate students studying organizational development or behavior, leadership development or human resource development. Students in more "generalist" HR courses may find this case too removed from mainstream HR to fit their needs and may find the content too challenging.

THE IMPORTANCE A LEADERSHIP DEVELOPMENT PHILOSOPHY TO ORGANIZATIONS

Having a leadership development philosophy is critical for organizations with value models that require leader collaboration. Leadership development should be based on a leadership development philosophy and result in less duplication of effort, less confusion among organizational areas and greater role clarity. Effective leadership development also should result in increased member engagement and capitalize on organizational opportunities through improved processes (such as delegation).

Leadership development approaches vary by organization and are intricately connected to an organization's strategic direction. Consequently, leadership development initiatives are often part of a larger organizational culture shift that can transform an organization and lead to entries into new markets and exits from existing ones.

For leadership development to be successful, a coordinated approach is needed. The approach is often derived from a leadership architecture that details the organization’s philosophy, strategies and objectives from a leadership standpoint. The leadership architecture should not only reflect the organization’s leadership development philosophy, it should be built from it. Based on the leadership architecture, a leadership architecture map should be created to provide detail into the approach that will be used to successfully implement leadership development at the organization.

Leadership Development Summary Table

Question	What leadership design principles fit with the organization’s future goals and competition?	How do the design principles translate into a broad “description-of-the-future” approach to develop future leadership?	What specific actions or content should be included in the program?
Tool	Leadership architecture (reflects the organization’s leadership development philosophy)	Leadership development map	Leadership development actions
Coverage	Covered in this case.	Not covered in this case.	

LEARNING OBJECTIVES

This case study about leadership development focuses on creating a leadership development philosophy specific to a particular organization and resulting in a more effective organization.

At the end of the case study, students will be able to:

- 1. Identify an organization’s educational needs and design a formal educational or training architecture.** This case study focuses on the educational needs of leaders. The training architecture focuses on the connection of a leadership development philosophy to a leadership architecture and leadership development map.
- 2. Identify how organizations gain sustainable competitive advantage through human capital strategies.** Students will learn how to gain competitive advantage through leadership development by aligning the leadership development philosophy to the organization’s future mission and goals.
- 3. Describe HR’s role in developing human capital strategies and HR’s impact on organizational success.** Students will identify the organization’s strategic development goals and link leadership development strategies to organizational strategy.

STUDENT EXPECTATIONS

As a member of the TRS committee charged with designing a leadership architecture, your assignment is to:

1. Identify the Society's strategic direction (using the Organizational Diagnostic Worksheet).
 - a. Understand the Society's future goals and priorities.
 - b. Understand the Society's competition.
2. Design an appropriate leadership development philosophy and reflect that philosophy in the leadership architecture (using the Organizational Diagnostic Worksheet and the Leadership Development Philosophy Preliminary Architecture Tools Guide Worksheet).
 - a. Diagnose the Society's leadership development needs.
 - i. Coordinate organizational members' efforts.
 - ii. Facilitate and encourage organizational goal attainment.
 - b. Use appropriate tools to design the architecture.
3. Map your leadership architecture recommendations (using the Leadership Architecture Map Worksheet).
 - a. Create a leadership architecture map.

RECOMMENDED PRE-READING

Day, D. (2007). *Developing leadership talent: A guide to succession planning and leadership development*. Alexandria, VA: SHRM Foundation, 3-5, 18-31.

Ulrich, D., Brockbank, W., & Johnson, D. (2009). The role of strategy architect in the strategic HR organization. *People and Strategy*, 32(1), 24-31.



Teaching note

Please review the case study before sharing it with students. It may be helpful to highlight areas where you can integrate your own materials.

Instructors should decide on whether to require the recommended pre-reading materials. Note that there is one recommended pre-reading listed in this manual that is not listed in the student workbook.

Instructors may want to introduce the case before students participate in it. Here are some possible teasers to include:

- Think about why leadership exists in organizations.
- How can an organization plan for developmental needs that apply to all leaders?
- Is having a standard set of leadership competencies enough to train leaders in an organization?
- What is the best way to build leadership at an organization?

Instructors can then assign students the reading that should be completed next (whether it is the pre-reading or the case study). In addition, instructors should inform students what is expected of them as part of the case study assignment. This may include one or more of the following, depending on how the instructor adapts the assignment:

- Reading the case study.
- Completing the organizational diagnostic.
- Designing the leadership development philosophy.
- Creating the leadership architecture map.
- Presenting students' work.

Instructors can discuss the critical points in the case either before or after students have completed their reading assignment.

The overall estimated time needed to complete this case study is 10 hours (approximately two hours in-class time and eight hours outside of class).

During the class, instructors may wish to:

- Conduct an in-depth discussion about student expectations as related to the case.
 - Have students present their leadership architecture maps and link the maps to the leadership development philosophy and the future direction of the Society.
 - Discuss the challenges faced during this assignment (e.g., working in a somewhat ambiguous situation, deciding among unlimited options, predicting the strategic direction of the organization and linking leadership development to that prediction) and the possible similar realities of leadership development in actual organizations faced with changing external environments and limited internal resources.
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Case Overview

Since 1939, the Toy Research Society (TRS), a nonprofit organization mainly supported by member dues and donations, has strived to fulfill its mission to provide toy aficionados with resources and information that enhance the enjoyment and understanding of toys. The organization provides resources and information related to topics such as toy history, toy business news, safety, manufacturing, media, and the effects of toys on development in children and adults.

TRS has grown through the many eras and changes of the toy industry. Over the years, publications such as *From the Toy Box Quarterly* and *Toy Time* have excited members and made headway with nonmembers through references in the popular press. Books written by TRS members have garnered general interest in the marketplace. In the past, TRS events were well attended and produced new members. TRS membership grew from 84 in 1939 to an all-time high of 7,400 in 1991.

Increased membership meant that more members were likely to conduct independent research or get involved in regional committee research related to the past, present or future of toys. Members who conduct research are TRS's lifeline, because the organization is almost exclusively member-run; TRS supports a full-time staff of only two individuals. Through regional chapters with volunteer leaders, TRS creates the content that members and nonmembers desire. There are seven members elected to the board of directors; there are currently 82 regional leaders (several chapters have co-leaders).

Membership stagnated in recent years and then decreased to 5,800. Fewer members are actively involved in research. Having fewer members and a smaller proportion of those involved in research has placed pressure on regional leaders to produce work on their own or through small cadres of member researchers, weakening TRS's competitive advantage—competent member researchers.

With regional leaders intent on producing research and less focused on engaging members and recruiting new ones, TRS has earned a reputation of being interesting and quirky but also outdated and slow. Mini-niche groups—some even spinning off from TRS entirely—have emerged on the Internet as alternative sources for the types of information previously provided by TRS. These spinoffs have contributed to the decline in TRS membership because TRS members are joining the mini-niche groups and allowing their TRS memberships to expire.

In addition, these mini-niche groups often are being called on by media outlets, further diluting TRS's recognition factor by nonmembers and stealing away potential future members. Unfortunately, the mini-niche groups are sometimes less likely to provide a high-quality answer to a popular press interested in speedy responses. The end result is that TRS is being perceived as packaged with the other mini-niche groups and of only decent quality when it comes to toy research. For many years, there were no other options for people who wished to engage in a community of those passionate about toys and research related to toy history. Now, there are clearly defined alternatives for those who wish to be a part of a toy-related community.

As TRS grew, there were naturally occurring opportunities to be more creative. Regional leaders would capitalize on opportunities to collaborate and developed some outstanding co-regional research. However, the opportunities began coming in at a much faster pace and with shorter deadlines. As a result, collaboration among chapters has dissipated, and with shrinking membership, it has not re-emerged. This lack of collaboration represents another weakened competitive advantage for TRS. Related to this lack of collaboration is a conflict issue. In some cases, regional chapters have produced similar work at nearly the same time but with conflicting results. While much of the discrepancies can be explained and balanced post-publication, the confusion is a disservice to TRS and its reputation.

A NEW TOY LEADER

The president of TRS has stepped down after 15 years in the position. The board of directors, after some in-fighting, has decided that the time is ripe to change the organizational culture. TRS leaders want to be more agile, place more focus on deep research skills and increase overall membership as well as membership with deep research expertise. In addition, TRS board members want regional leaders to promote this new culture, finding new ways to collaborate while increasing efficiency and accuracy.

A committee was formed to build a leadership development architecture for TRS, something completely new to the organization. As a TRS member and someone with HR knowledge, you were selected to serve on the committee.

FUTURE OPPORTUNITIES AND COMPETITION

Direction

The core consumer group for the toy research industry tends to have a high disposable income. However, many potential members have gravitated toward other related industries (e.g., high-end toys). Toy research has not appealed to the masses. Because it is not at the core of the toy industry and requires a financial investment that could otherwise be spent on toys, many potential members have elected to participate in other toy-related purchasing decisions. The failure of the toy research industry to build large-scale appeal has led to the creation of niche organizations.



Teaching note

Instructors may wish to take time during this section to explore some indirectly related management concepts with students. The payoff for students is the visible linkage of the organizational strategy to HR initiatives.

Porter's (1985) competitive advantage categories are particularly aligned with the discussion on the direction of the industry as related to TRS. Porter discusses making the choice regarding where to strive for competitive advantage. Specifically, the three categories are cost leadership, differentiation and focusing.

To achieve a cost-leadership advantage, an organization must produce products at a lower cost than competitors. The cost advantage may be obtained in various ways (e.g., economies of scale).

Differentiation is achieved by offering a unique product or product feature. A unique product is an example of differentiation, but differentiation also can occur with a product that is not unique but is delivered through a medium that is unique in the industry.

Focus is the choice by an organization to target a particular consumer segment and serving that segment better than other organizations in the industry.

There are risks associated with each of these competitive advantage strategies. An organization may succeed with a particular competitive advantage at one point in time but lose that competitive advantage as the industry or environment changes.

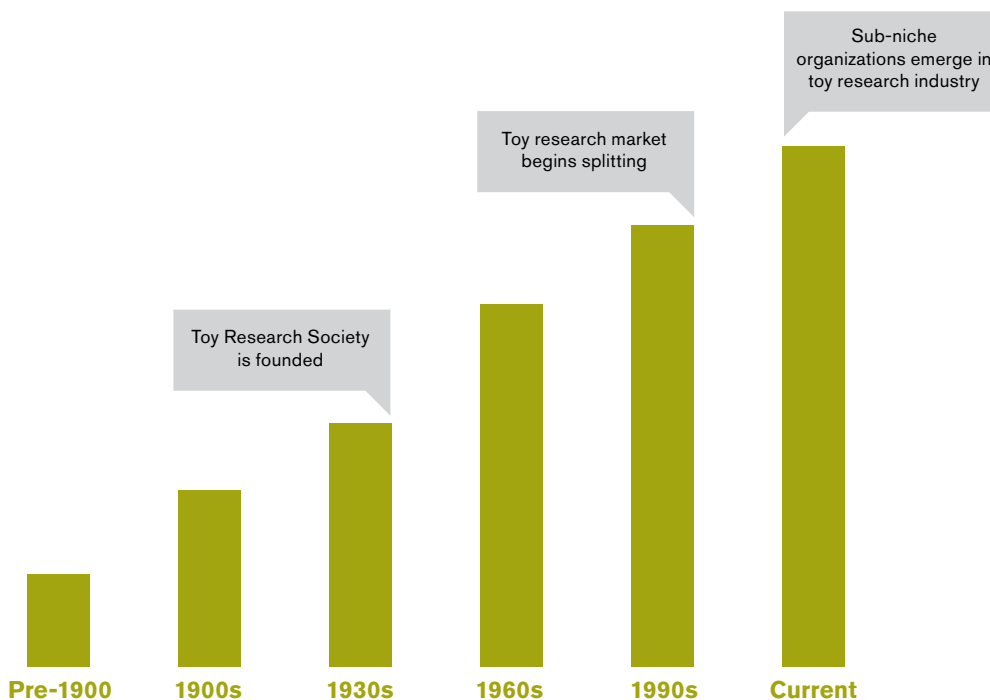
Based on the competitive advantage choices made by an organization, the HR function should identify and address the talent management and organizational development opportunities (e.g., leadership development) that will enhance the success of the organizational strategy.

Niche organizations can succeed in an industry, provided it has a specialized product or service unavailable elsewhere. Another option for a niche organization in the toy research industry is to focus on a particular geographical area or on a specific type of media outlet.

One emerging issue for the industry is the development of mini-niche organizations (for example, organizations that focus on video games or educational toys). These organizations operate on the same principles as niche organizations but have an even more specialized product or service. Thus, these organizations have less to manage, and they can cherry-pick the strongest products or services from niche organizations and deliver them at a greater efficiency, often using virtual technologies. The mini-niche market has put greater pressure on niche organizations to find new ways to create unique products and services and to move faster in decision-making and response to change.

Larger organizations in the industry, such as toy store chain stores, with divisions focused on toy research take advantage of the ability to offer a full suite of products and are more efficient in their dealings, which often cover larger geographic ranges. Diversifying their product base allows larger organizations to better handle the changing demographics in the industry. Larger organizations also have more visibility through sponsorships and alliances.

Toy Research Timeline



The complexity and speed of change in the toy research industry has increased over the years. TRS's competitive advantage is diminishing, and leaders who can outperform the competition will be a key differentiator for TRS going forward.

The recent success of movies and television shows based on toys and a growing international interest in new types of toys has led to an expectation that the industry will have a boom in the next few years, resulting in an entire new set of toy research consumers. Organizations are planning for these new toy research consumers by being ready to deliver the right new products and services that align with customer interests. TRS must be ready to adapt to environmental changes and must develop sensitivity, flexibility and responsiveness. It is essential that TRS leaders support these elements through problem solving and innovation. TRS leaders need to guide members toward an environment that encourages prompt action and creativity (Chemers, 1997).

TRS ORGANIZATIONAL STRUCTURE

TRS currently has a board-driven structure. There is a seven-person elected board that has some formal governance responsibilities and much informal governance responsibilities. It is a static board; all members have served at least four years.

Boards should spend most of their time determining strategic direction and approving organizational action. The TRS board, though, has spent little time scanning the external environment and identifying innovative practices, potential threats or risks to the Society. This lack of attention to the external environment has prevented TRS from building its image and brand.

Effective boards identify organizational priorities and align them with needed knowledge (Conger, Lawler & Finegold, 2001). TRS board members realize they have some knowledge “blind spots” and have tried to alleviate them by relying on committees culled from Society membership. That is how you were identified (with your HR expertise) to be a part of the leadership development architecture committee.

In addition to the board of directors, there is a Society president, who is responsible for membership goals and fundraising. This position is currently open and may be open for some time. The board cannot agree on how to approach hiring the next president. The former president had been in the position for 15 years, and the board of directors had become quite comfortable with his work. His fundraising from within the Society membership ranks was outstanding year after year, partly because of an aging membership with higher-than-average incomes. The declining membership numbers were less concerning to the board because of the president’s successful fundraising.

The leaders who drive the Society and who are considered the primary focus for leadership development are the regional leaders. Regional leaders represent TRS chapters based on geographical area.

Regional leader responsibilities include:

- Setting the tone for the work of region's chapters, including research that chapters may undertake.
- Engaging regional members in research.
- Ensuring that region members have access to the information they need to conduct research or enjoy the fruits of research.
- Coordinating with other regions as needed.
- Coordinating region chapter events.
- Coordinating regional membership recruitment.
- Providing research-related toy resources to media, schools, charities, etc.

In the past, regional leaders could meet all their responsibilities, but today there are fewer members and researchers to take on research opportunities. This has caused regional leaders to be actively involved in more research, even when it falls outside their fields of expertise. In some cases, there is a small cadre to share in the research opportunities, but it is not nearly as prolific a cadre as in the past.

Regional leaders are volunteers who are frequently selected informally. The outgoing regional leader often picks a successor, usually someone who has been active in the regional chapter and who shares many of the same values as the outgoing leader. The benefit to this approach is that it fosters an ongoing trail of passionate researchers as the heads of the regions. The process is not democratic, however, and may fail to take into account the skills and abilities needed to lead during changing times.

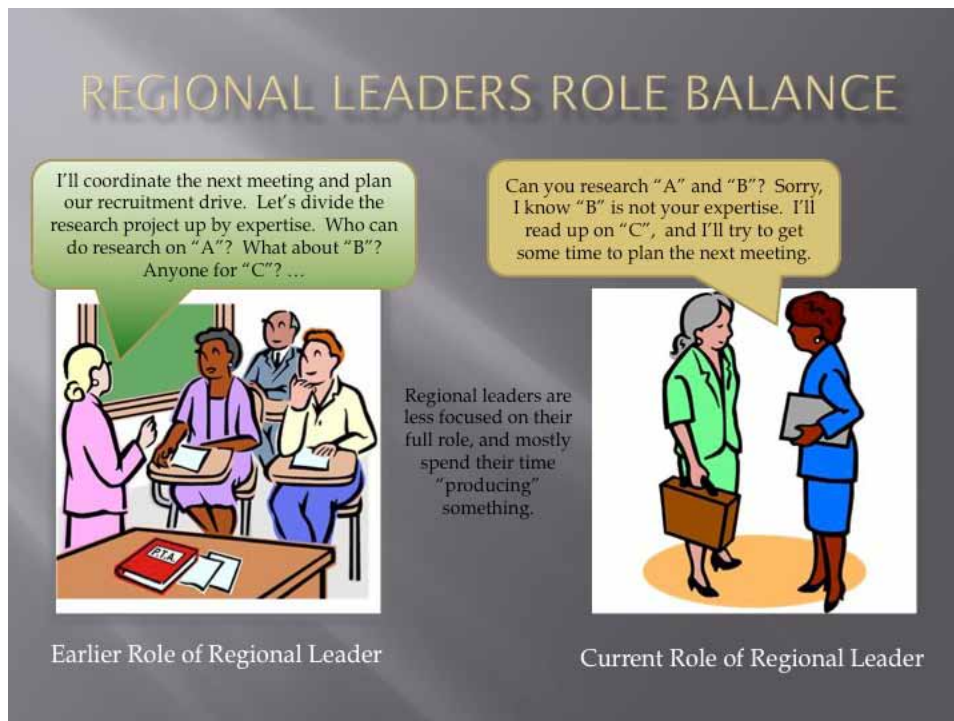
There are some touch points among regional leaders and the overall Society leadership. Regional leaders deliver an annual report to the board of directors, and funds for regional activities can be requested through the Society president. Regional chapters often contribute to publications, and all members receive copies of those publications. At the annual conference, regional leaders present their region's work from the previous year. Quarterly conference calls between regional leaders and the Society president have taken place fairly often over the last decade.

There are also subdivisions of leadership known as special topics leaders. For example, regional chapters could have special topics leaders head-up units based on shared content, such as educational toys, or based on delivery medium, such as Internet toys.

Special topics leader responsibilities include:

- Providing guidance on an area of shared content to regional researchers.
- Implementing and maintaining a regional research program on an area of shared content.
- Developing approaches to researching areas of shared content.

A regional leader will occasionally receive the extra benefit from the presence of a special topics leader if the special topic happens to align with a current research opportunity. From a leadership development perspective, these leadership subdivisions may affect the choices made during the design of a leadership development architecture.



Regional leaders are moving more into manager roles, where they complete the work rather than serving as leaders who delegate, coordinate and collaborate with other leaders in the organization.

MISSION STATEMENT

TRS's mission statement has remained the same since the Society's formation:

“The Toy Research Society is the place to play for anyone interested in toy research.”

Toy-related research conferences and academic lists have emerged over the years, but TRS believes its organizational purpose is to be a centralized provider of accurate, in-depth research related to toys.

NEW CULTURAL BELIEFS

In a final act with the outgoing president, the board of directors developed a formal set of cultural beliefs for the Society moving forward. The new cultural beliefs are as follows:

- Always at play: Strive to think about toys in all of your daily activities.
- Be an expert: Provide research and data that others cannot.
- Share your toys: Find ways to inform others about toy research.

Implementing the new cultural beliefs will be important to the future success of the organization, and the regional leaders and special topics leaders will be critical players in making the cultural beliefs a reality.

CURRENT CHALLENGES

With internal changes at TRS and external ones in the toy research industry, there are several challenges that must be confronted by TRS. These challenges include:

- Rebuilding a declining membership.
- Re-establishing a more prominent media presence.
- Controlling role balance for regional leaders.
- Staving off competition from sub-niche organizations.

CURRENT HUMAN RESOURCE INITIATIVES

The development of leaders for today and tomorrow is a human resource priority for the TRS board of directors. Your work on designing a leadership architecture is absolutely critical to helping TRS gain a competitive advantage. Your work should also reduce leader role confusions and help the Society optimize its resources.

Other HR or HR-related initiatives identified as important to the Society's future include increasing leader and member diversity and improving automation of many membership processes. The latter initiative fits as part of a larger technical initiative to improve the Society's online capabilities.

These HR initiatives are informal because there is no formal HR presence in the Society's organizational structure. HR administrative work is outsourced. Strategic HR work (e.g., the leadership architecture) has been completed by the board of directors.

YOUR CHALLENGE

As a member of the TRS committee charged with designing a leadership architecture, your assignment is to:

1. Identify the Society's strategic direction (using the Organizational Diagnostic Worksheet).
 - a. Understand the Society's future goals and priorities.
 - b. Understand the Society's competition.
2. Design an appropriate leadership development philosophy and reflect that philosophy in the leadership architecture (using the Organizational Diagnostic Worksheet and the Leadership Development Philosophy Preliminary Architecture Tools Guide Worksheet).
 - a. Diagnose the Society's leadership development needs.
 - i. Coordinate organizational members' efforts.
 - ii. Facilitate and encourage organizational goal attainment.
 - b. Use appropriate tools to design the architecture.
3. Map your leadership architecture recommendations (using the Leadership Architecture Map Worksheet).
 - a. Create a leadership architecture map.

Your work to create a leadership development architecture and introduce leadership development will hopefully achieve TRS's organizational strategies and outperform expectations, especially when compared with organizations lacking a leadership development strategy (Corporate Leadership Council, 2008). The leadership development strategies you recommend also should help reduce several organizational risks. Some of these risks include wasted time and money, underdeveloped leadership and disengaged leaders and members (Corporate Leadership Council, 2007).

ORGANIZATIONAL DIAGNOSTIC FOR STEPS I & II OF YOUR ASSIGNMENT

(Instructors: Adapt as appropriate)

Answer each of the diagnostic areas. The diagnostic areas specific to leadership development should help you formulate your leadership development philosophy for TRS.

Diagnostic Area	Answer
Summarize the Society's background.	
Identify the Society's challenges.	
Identify three potential risks to the Society. Rate the severity of the risk as high, medium or low. Note the potential negative result of each risk.	
Identify objectives that might be achieved for the Society through leadership development.	
Identify the different leader roles/jobs that exist in the Society.	
Identify leader skills that might be needed in the future.	

Diagnostic Area	Answer
<p>Describe the prioritization of leadership development for different leader roles.</p>	
<p>What leadership development activities are most likely to be successful for the Society?</p>	
<p>What message or vision best summarizes the need for leadership development at the Society?</p> <p>(This becomes your leadership development philosophy. The philosophy should emerge from the answers provided to the above questions. It may make more sense to have the leadership development philosophy listed as two or three key bullet points or through a visual presentation.)</p>	
<p>How can leadership development be aligned with talent management at the Society?</p>	
<p>What behaviors will be exhibited by leaders if leadership development is successful at the Society?</p>	

**LEADERSHIP DEVELOPMENT PHILOSOPHY PRELIMINARY
ARCHITECTURE TOOLS GUIDE FOR STEP II OF YOUR ASSIGNMENT**

Place a check mark next to each of the practices you would like to include in the leadership development system at TRS. Under “other,” feel free to add any additional practices you believe will help TRS develop leaders in a way that will align with the leadership development philosophy you established through the diagnostic.

Leadership Development Category	Include?	Notes
Training		
Personality inventories		
360-degree feedback		
Assessment centers		
Coaching		
Mentoring		
Job assignments		
Action learning		
Other		
Other		
Other		
Other		

SAMPLE LEADERSHIP ARCHITECTURE MAP FOR STEP III OF YOUR ASSIGNMENT

(Generic organization in simple-form, single-phased approach)

The sample below will not fit for TRS. The map you create should be based on the decisions you made for Steps I and II of the assignment.

Goal: Leadership development will help the organization become a more agile organization that is constantly changing to appeal to newly forming markets.

	Education	Assessment	Coaching and mentoring	Experience
Manager of business	Public relations training	n/a	Executive coach	Design a new product
Manager of managers	Change management Creative use of talent	360-degree feedback	Executive coach	Lead a change-management initiative
Managers	Prioritization Time management	Assessment center	Mentor	Manage a redeployed team Manage a struggling team

Your leadership architecture map can vary in presentation from the one above (e.g., a leadership architecture map may be in the form of chart, similar to above, or in a graphic form). Include the following in your leadership architecture map:

- Goal of leadership development for the particular organization; this will likely be obtained from the organizational diagnostic.
- Level or type of leader (e.g., regional leader, special topics leader, board of directors).
- Method of leadership development (e.g., experiential, education).

You may also want to include the following in your leadership architecture map.

- Timeline for rollout of leadership development (e.g., within six months, 6-12 months).
- Expected business impact of the particular portion of leadership development (e.g., improved accuracy among functional areas of the organization).

Key Takeaways

For TRS, leadership development is a critical element of the Society’s future.

Leadership development is critical to:

1. Identify the educational needs of the Society.
2. Ensure that the Society is prepared, through human capital strategies, for current and future business challenges.
3. Obtain a competitive advantage through a philosophy of leadership development that fits with organizational strategy.



Teaching note

The following items are a sample leadership architecture model and map specific to TRS.

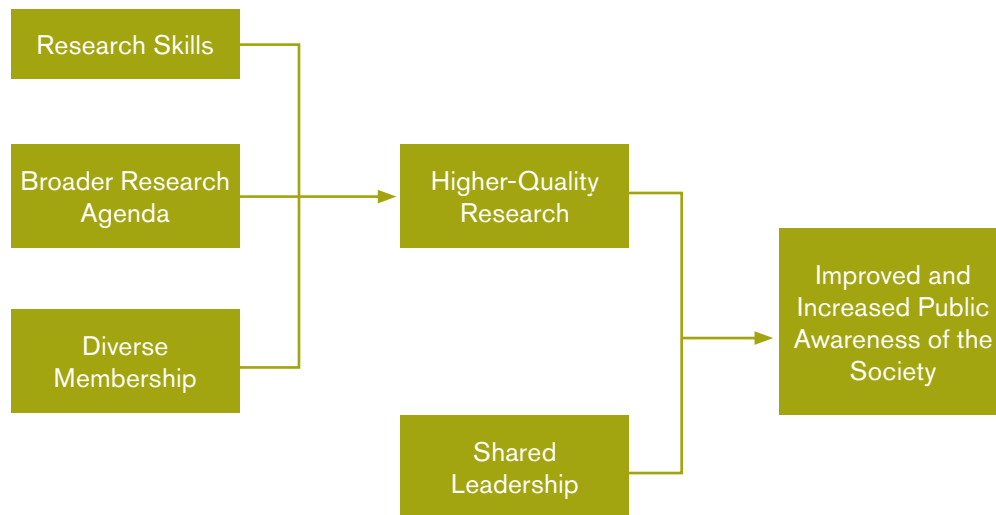
Diagnostic Area	Answer
Summarize the Society’s background.	<ul style="list-style-type: none"> ▪ Nonprofit society. ▪ Mature organization. ▪ Long-time president is resigning. ▪ Volunteer leadership. ▪ Focused on toy research.
Identify the Society’s challenges.	<ul style="list-style-type: none"> ▪ Rebuilding a declining membership. ▪ Re-establishing a more prominent media presence. ▪ Controlling role balance for regional leaders. ▪ Staving off competition from sub-niche organizations.
Identify three potential risks to the Society. Rate the severity of the risk as high, medium or low. Note the potential negative result of each risk.	<ul style="list-style-type: none"> ▪ Losing differentiation advantage in the industry (high risk). This could result in less consumer interest and possibly the end of the Society. ▪ Overburdening regional leaders (medium risk). This could result in burnout or disengagement of regional leaders; regional leaders may resign from position. ▪ Failure to adapt to new cultural beliefs (medium risk). This could result in stagnation of Society and failure to capitalize on opportunities available through change.
Identify the objectives that might be achieved for the Society through leadership development.	<ul style="list-style-type: none"> ▪ Outperform membership expectations. ▪ Outperform media recognition objectives. ▪ Reduce time needed to complete research. ▪ Avoid costs associated with outsourcing or fund requests by regional leaders. ▪ Increase engagement of regional and special topics leaders.
Identify the different leader roles/jobs that exist in the Society.	<ul style="list-style-type: none"> ▪ Board of directors. ▪ President. ▪ Regional leaders. ▪ Special topics leaders. ▪ Members (self-leadership).

Diagnostic Area	Answer
Identify leader skills that might be needed in the future.	<ul style="list-style-type: none"> ▪ Recruitment/ambassador skills. ▪ Managing research skills. ▪ Media relations skills. ▪ Social media skills.
Describe the prioritization of leadership development for different leader roles.	<ul style="list-style-type: none"> ▪ Leadership development of regional leaders would probably most benefit the Society. ▪ Special topics leaders could have their roles restructured. This may provide advantage to the Society through leadership development. ▪ The board of directors could become more strategic and help the Society in the future. Some may see an immediate need to develop board members on change management so they can drive the culture change. ▪ The president position is a low priority for leadership development because there is not currently anyone in the position.
What leadership development activities are most likely to be successful for the Society?	<ul style="list-style-type: none"> ▪ Experiential activities would probably best serve the Society. ▪ Coaching or mentoring could also be useful to regional leaders and special topics leaders. ▪ Consideration needs to be given to the geographical obstacles when putting together leadership development activities.
What message or vision best summarizes the need for leadership development at the Society?	<ul style="list-style-type: none"> ▪ Higher quality and faster research along with shared leadership will lead to improved visibility by the public.
How can leadership development be aligned with talent management at the Society?	<ul style="list-style-type: none"> ▪ Because the Society is also trying to improve its diversity, it could use leadership development to recruit greater diversity into the leadership ranks and educate leaders on how to recruit a diverse group of members.
What behaviors will be exhibited by leaders if leadership development is successful at the Society?	<ul style="list-style-type: none"> ▪ Regional leaders will coordinate with special topics leaders to better share the work. ▪ Regional leaders will coordinate with other regional leaders to avoid duplication of effort. ▪ During conference calls with the Society, leaders express how engaged they are. ▪ Regional leaders work through the board of directors and with other regional leaders to implement large-scale projects beneficial to the Society.

Place a check mark next to each of the practices you would like to include in the leadership development system at TRS. Under "other," feel free to include any additional practices you believe will help TRS develop leaders in a way that will align with the leadership development philosophy you established through the diagnostic.

Leadership Development Category	Include?	Notes
Training	X	
Personality inventories		
360-degree feedback		
Assessment centers		
Coaching	X	
Mentoring	X	
Job assignments	X	
Action learning	X	
Other		
Other		
Other		
Other		

Driving the leadership architecture for TRS is the idea that higher-quality research and shared leadership will lead to improved visibility by the public.



Teaching note

The leadership architecture map translates the guiding principles or model into a suggested reality. The map below shows what would likely be used by TRS and also includes more activities than identified previously.

	Within the next 12 months	12-24 months
Board of Directors		<ul style="list-style-type: none"> ▪ Encourage diversity (education). ▪ Strategic planning (education). ▪ Join another board as a non-content expert (experiential).
Regional Leaders	<ul style="list-style-type: none"> ▪ Presentation skills for the external environment (education). ▪ Managing volunteers (education). ▪ Recruiting strategies (education). ▪ Innovative research techniques (education). ▪ Personal learning strategy (assessment). ▪ Take on a project outside of comfort zone (experiential). ▪ Work with a board member on a research project (experiential). ▪ Seek out an opportunity to experience being a member of a similar society (experiential). ▪ Have another regional leader provide feedback on how similar situations were handled in the past (coaching). 	



Teaching note

Here is another sample of a leadership architecture map.

Regional Leaders Leadership Development Map

	Immediate	6 months	12 months	18 months
	Recruitment/ ambassador skills	Manage research skills	Media relations skills	Social media skills
Method(s)	<ul style="list-style-type: none"> ▪ Discussions ▪ Readings ▪ Role plays 	<ul style="list-style-type: none"> ▪ Challenging projects ▪ Project planning ▪ Coaching 	<ul style="list-style-type: none"> ▪ Training ▪ Role plays 	<ul style="list-style-type: none"> ▪ Action learning project
Business Impact	Increased membership	Research (quality and speed)	Higher visibility	New product delivery method



Teaching note

Once the leadership architecture is established, the committee can begin developing the leadership development program. This includes “fleshing out” the details of each portion of the design.

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Appendix A

Supplemental Reading



Teaching note

Instructors should read the following information and decide what portions are appropriate for their class. This material lends itself to class discussions.

CONNECTING LEADERSHIP DEVELOPMENT PHILOSOPHY AND DEVELOPMENT TO OVERALL ORGANIZATIONAL ALIGNMENT

The anticipated metrics for any leadership development strategy are achieved value and reduced risks. However, it can be extremely difficult to demonstrate the analytical link connecting leadership development to organizational needs (Day, 2007). There is growing attention on fitting the desired leadership development outcomes to the organizational context (e.g., McGurk, 2010).

Not only does leadership development connect to overall organizational needs, it also connects with other talent management needs. Leadership development can be a part of a talent management dashboard because it contributes to the effectiveness of the organization when transitioned from merely reporting data to serving as a data-support mechanism for decision-making (Corporate Leadership Council, 2005, 2010). In fact, a key element of leadership development from a talent management perspective is looking to the future (Lawler, 2009), and the information obtained from a talent management dashboard is critical to that activity. The decision-making component is often demonstrated through a link between the leadership development philosophy and the leadership development program.

DESIGNING A LEADERSHIP ARCHITECTURE AT TRS

When designing the leadership architecture at TRS, it is important to consider the difference between leader development and leadership development (Dalakoura, 2010; Day, 2001). Leadership is not about individual skills but about the relationship among leaders and the social and organizational environment. A leadership architecture needs to account for the social and organizational environment. Leadership architectures vary by industry and organization (see Carter, Ulrich & Goldsmith, 2005, for examples of different approaches to leadership development).

The key questions are:

- What intervention areas will affect overall organizational results?
- What intervention areas will not have a significant effect (Day, 2007)?

Answering these questions will help identify the overall leadership architecture.

Sample diagnostic questions to consider include the following:

- What results is your organization seeking?
- How does your organization define leadership development?
- What leadership development strategies are likely to work in your organization?

Once an organization can answer these questions, the message or vision that serves as the foundation for the leadership architecture can be determined (Carter, Ulrich & Goldsmith, 2005). This message or vision is absolutely critical because it represents the organization's leadership development philosophy. If an organization identifies an incorrect leadership development philosophy or does not identify a leadership development philosophy, the intended leadership development outcomes will be difficult to achieve.

For TRS, it may be appropriate to use a broad-based framework that focuses on the leader and the leadership development mode. Alternatively, it may make more sense to use a framework designed to take advantage of a particular organizational strength, such as the collective leadership framework (Friedrich et al., 2010), which espouses that leadership is a role that can be selectively distributed among individuals in a team depending on the expertise required. For TRS, it may be most appropriate to design a different framework that optimizes the fit for the context within which TRS and its industry operates.

Leadership architecture frameworks may refer to the larger structural pieces of the architecture that guide the details developed going forward (Byrne & Rees, 2006). Ultimately, the framework provides composition to the various components of the architecture and direction to future add-ons.

During the search for the framework, a discussion regarding critical leadership capabilities and risks for TRS may emerge. This discussion fits nicely with the HR role of strategy architect (Ulrich, Brockbank & Johnson, 2009). Specifically, the discussion relates to sustaining strategic agility. As part of this challenge, HR strategy architects look two to three years into the future and forecast the anticipated skills their leaders will need to have to sustain a competitive advantage. For example, there may be increased reliance on regional leaders to recruit new members. This may require sales, marketing or specific communication skills that were not required in the past. As an organization identifies its longer-range planning strategies, future skills that will be needed become clearer. Shifting to a new culture also causes these skills to be more pronounced.

Of course, skills may be relative to scope. Arguments have been made that effective leaders practice the same behaviors regardless of leadership level. For example, behaviors needed by all leaders might include the ability to:

- a. Look to the future.
- b. Manage performance.
- c. Achieve minimal distance between self and those being led.
- d. Communicate directly and effectively with members.
- e. Model accountability for leadership development involvement.
- f. Support shared leadership (Lawler, 2009).

Arguments have also been made that the level of work (e.g., manager versus director versus vice president) is essential to determine the needed leadership development skills (Jacques, 1998; Corporate Leadership Council, 2007). This also can help some organizations separate more critical positions from less critical ones. For example, with TRS, it may be more important to provide leadership development for regional leaders than for the board of directors, although the tendency is to consider higher-ranking work levels as more critical.

Segmentation can also help establish the focus of a leadership development architecture. In TRS's case, it may make the most sense to provide leadership development for regional leaders and not to the incoming president, or to revisit the leadership development needs for the incoming president at a later date.

After building the framework and determining scope, leader development practices can be applied to the architecture. Leadership practices categories can be broken into many typologies. One popular format is to divide the practices into education, assessment, coaching and experiential learning (Day, 2007).

Classroom training and corporate universities fall under the education domain. Educational opportunities provide leaders with similar exposure to concepts, plans, knowledge and skill growth. One of the questions revolving around educational opportunities is the transfer of training from the classroom to the job (Day, 2007). Some organizations have designed creative solutions that help facilitate the transfer of training by extending the classroom to the job (see Roche, Wick & Stewart, 2005, for an example).

Assessment includes personality inventories, 360-degree feedback and assessment centers (Day, 2007). Most of these practices are for leader development rather than leadership development. To make assessments organization-specific, the assessment can be combined with other practices (e.g., education or coaching) to make the content better fit the context.

Coaching includes executive coaching and mentoring (Day, 2007) and can enhance the value of assessments. Mentoring can benefit individuals newer to a skill or skill set by receiving development from individuals with more advanced experiences with the same skill or skill set. One of the most important contributions made by a coach or mentor is helping a leader step out of his or her role and view the situation as an insider and an outsider at the same time (Thomas, 2008).

Experiential learning includes job assignments and action-learning projects. A model for organizations wishing to use experience-based learning includes preparing, deploying and renewing (Thomas, 2008). In this model, leadership development opportunities occur naturally, and it is up to the organization to ensure that the proper tools are in place for a leader to make the most of a leadership development opportunity. Interestingly, many leadership development opportunities in this model occur outside of the workplace. The model also allows for combining experiential learning with the other types of leadership development practices.

For TRS, the question is, which leadership development practice(s) will best fit its leadership framework?

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