Identifying Real-World Leadership Competencies

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- ■ Why leadership competencies are important.
- ■ How identifying competencies with the right fit is critical for long-term success.
- ■ The connection between identifying effective leadership competencies, corporate culture, organizational brand, and financial results.
- ■ Implementation tips from renowned, consistently successful organizations.

To effectively implement leadership competencies, it is crucial to have an understanding of what particular leadership abilities are needed by an organization. Once this foundation has been established, the organization can better align, communicate, and implement its guidelines for all operational efforts to achieve excellent results. And the best sources for identifying how highly competent leadership can lead to proven results are those organizations that are consistently producing them. The different industries showcased in this chapter reflect a wide variety of philosophies and tactics for best developing leadership throughout an organization—whether large or small, private or public sector.

Introducing Leadership Competencies

Are you considering identifying leadership competencies as a tool to improve your organizational results? You're not alone. The importance of leadership for the success of any operation cannot be overstated. Most organizations eventually explore this tool to clarify and focus the selection, development, and assessment of their leaders. Unfortunately, most professionals view identifying competencies as some mysterious process—especially when considering tactically implementing them into their business.

There are several challenges when attempting to actually implement leadership competencies. The first is that there are so many definitions of what specifically makes up a competency.

Established leadership talent management firms such as Lominger, Development Dimensions International, and Personal Decisions International have built their corporations on providing large-scale, statistically sound systems for leadership competencies, yet they each have differing approaches: "Organizations sometimes get hung up on the words, and then miss what they really mean" (Crosby 2009).

For the purposes of this chapter, I generically define a competency as the ability to use either knowledge or a skill in the performance of a role. In other words, what must a leader know and be able to do to become successful?

In addition to this definition, there are two types of competencies most commonly accepted in this field of study: conceptual competencies (what you know, such as past experiences, qualifications, and the like) and behavioral competencies (how you use what you know). The conceptual type is the first (internal) step toward mastery. However, to be deemed fully competent, an organization's leaders must progress to the more measurable (external) behavioral competencies. In the metrics-minded business world, success means achieving measurable results.

Finally, competencies generally pertain to three different dimensions: position level (formal span of responsibility within the organization—individual, manager, or executive level?), skill level (is the person skilled or unskilled?), and specific type of competency (skill or knowledge).

"Of course leadership competencies are important. What's the alternative? Leadership in*competencies?"*

—Lee Cockerell, former executive vice president of operations,
Walt Disney World Resort

Another common challenge regarding leadership competencies is the tendency for businesses to address competencies in a conceptual manner that has little relevance for their day-to-day functional operations. Organizations often get so bogged down in theoretical concepts that the competencies they identify lack relevance and fail in the implementation phase. According to Claudio Diaz (2009), chief human capital officer of the renowned accounting firm Wipfli, "Competency models are at the core of every [human resource] process that will make you successful and ultimately get you exceptional leadership in your organization. If you put your competency model together correctly, you will be engaging your highest performers first. From there, they will influence the next level to follow—similar to a shock wave."

This chapter illuminates why organizations select particular competencies to guide their leaders. Successfully implementation requires understanding why, so you can know what leadership competencies to implement and how to best implement them. The goal is to provide insights and tools that overcome the obstacles to making the most of leadership competencies.

Proven Real-World Results

When searching for business solutions, most professionals make the mistake of grasping at the trendy business management fad of the day. But rather than chasing such unproven theories, the most successful professionals benchmark organizations that have a proven record of consistent, long-term success. The key is not to simply analyze what they do tactically but also to understand how they think. Implementing the process of achieving success allows adapting to ongoing changes in any work environment—regardless of the industry.

The first step in creating sustainable business results is to understand how outstanding organizations all around the world earn their rank as best-in-industry leaders. According to J. Jeff Kober, chief executive officer of World Class Benchmarking, LLC, a consulting firm that actively showcases proven world-class business excellence, "there is an amazing consistency in the formula that nearly every industry-leading organization follows to achieve exemplary results. They have done the essential work of connecting the dots between business results and the root causes of those results" (Kober 2009). World Class Benchmarking's Chain Reaction of Excellence Model reflects this formula, as shown in figure 12-1.

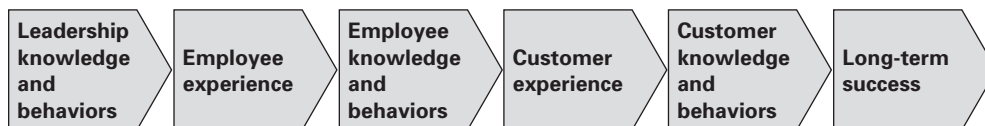**Figure 12-1. The Chain Reaction of Excellence Model**
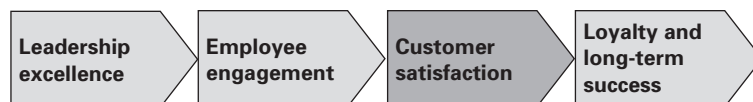
Looking at the model portrayed in figure 12-1 from right to left, customer loyalty and long-term business success are the natural consequences of customer satisfaction, which is created by employee engagement and excellent service. And the catalyst for the entire process is leadership excellence. Leaders throughout an organization influence the environment within which the resulting steps in the formula take place. The potential of any organization, therefore, is directly linked to the abilities of its leaders—thus spotlighting the crucial importance of leadership competencies.

Kober (2009) continues, "Ironically, focusing solely on the financial results at the end of the formula severely undermines the outcome. Like any formula, the secret to achieving the desired outcome is to focus on what precedes the end result. That is the aspect we can control. Improving the quality of the early parts of the formula will naturally result in improvements to the results at the end."

A key part of the never-ending effort to achieve corporate growth is identifying the most beneficial opportunities for improvement along the entire chain of operational touch points. Let's review the Chain Reaction of Excellence Model from a competencies (knowledge/ behaviors) perspective; we'll call this the Competency-Success Chain Model, as shown in figure 12-2. The leader's competencies (knowledge and behaviors) create an employee experience that influences those employees' competencies. This, in turn, affects the quality of customers' experience, which influences their knowledge and behaviors (that is, they become more loyal), which results in the long-term success of the organization.

On the basis of these consistent dynamics, the most successful organizations have discovered a key competitive insight: Any organizational improvement effort is, at its core, a leadership improvement initiative—and not simply for leaders with formal titles at the top of the organizational chart but also influential leaders throughout the organization. To achieve the best possible corporate culture, external service, and financial results, organizations must select the leader with the right fit for their unique situation: "If you don't design what matters into your leaders, then the rest of your operational efforts are a waste of time" (Crosby 2009). Simply put, improved leadership begins a chain reaction of improvements that, when implemented correctly, have a positive impact on every aspect of the organizational experience.

Figure 12-2. The Competency-Success Chain Model

Leadership knowledge and behaviors → Employee experience → Employee knowledge and behaviors → Customer experience → Customer knowledge and behaviors → Long-term success

Given that an organization's leaders have such a profound influence on its health, it makes sense to optimize every leader's knowledge and behaviors to improve the results for all aspects of the organization. Most companies typically start the process by asking "What are the best leadership competencies?" However, considering the dynamics of the Chain Reaction of Excellence Model, the most renowned organizations instead ask "What do we ultimately want to accomplish and how will we know when we've succeeded?" These two questions create a more comprehensive frame of reference for addressing the systemic nature of their business—and the answers to these questions provide a better context for identifying the right competencies for their unique circumstances.

Been There, Doing That

Contrary to the popular opinion that the ultimate role of the leader is merely to drive financial results, proven world-class organizations are convinced that the leader's role is to affect every part of the organization so that the natural consequence is long-term success. Once a person is promoted to a position of leadership, his or her professional tools are no longer things; they are people and ideas, communication and processes—summed up in their leadership competencies. Leaders must orchestrate their front line's knowledge and behaviors while influencing the people who actively implement these competencies. To be truly successful, leaders throughout the organization must consider the corporate ramifications of their decisions, but execute in cooperation with their local teams to make it happen (Meath 2009).

To better understand the pragmatic implementation aspects of the tool of identifying leadership competencies, executives from renowned organizations in vastly different industries were interviewed to provide insights about selecting, implementing, and best leveraging this tool; see table 12-1. Despite the differences in their history, industry, and organizational dynamics, these organizations have one thing in common: They have become extraordinarily successful. They are all known for exemplary internal cultures that have generated legendary service and raving advocates—resulting in consistent industry-leading growth and profits. The next section of this chapter explores how each of them has addressed competency-related issues, bridging the gap between theory and tactical application to achieve proven results.

Success by Design: Steps toward Competency Engagement

For every organization, there comes a crossroads regarding whether or not it is satisfied with the status quo. Benchmarking how the most successful organizations navigate this process becomes a portal to discovering what creates leadership competencies that really work in the real world.

Table 12-1. Contributing Interview Subjects

Name/Position	Company	Background
Lee Cockerell, former executive vice president of operations and author of the best-selling book *Creating Magic*	Walt Disney World Resort	In the 1990s, Disney World initiated Performance Excellence, a company-wide organizational improvement initiative that included a transformation of leadership with Great Leader's Strategies. The results have become known as the "Disney Decade" of record-breaking growth and profits.
Michelle Crosby, former senior vice president of human resources	Starwood Hotels and Resorts	In 2004, Starwood Hotels, home of brands such as Westin, Sheraton, St. Regis, and W, began a systematic transformation effort to align its cultures and brands into a unifying whole—resulting in dramatically improved metrics across all divisions, brands, and job levels.
Jack Roddy, director, partner resources	Starbucks Coffee Company	Earning multiple-year awards for the most prestigious accomplishments—*Fortune*'s best companies to work for, top ten most admired companies, best corporate citizen, top brands list, and so on—Starbucks attributes its global success to their strategically established competencies.
Pat Jannausch, vice president of culture and organization development	Con-way, Inc.	This $5 billion freight transportation and logistics services company changed its industry by focusing on leadership competencies that support innovation and employee engagement.
Gerard Q. Pierce, senior vice president of human resources; and Anne Meath, director organization development	Wegmans	This multiple-award-winning major supermarket chain is one of the largest private companies in the United States. Considered the benchmark experience of supermarket chains worldwide attributed to consistent competency implementation.
Claudio Diaz, chief human capital officer	Wipfli LLC	Voted as one of the best accounting firms to work for in the nation (*Accounting Today*), Wipfli ranks among the top 25 accounting firms in the United States. The competency-driven Wipfli Way creates a unique experience for both clients and associates.
J. Jeff Kober, chief executive officer and co-author of *Lead with Your Customers*	World Class Benchmarking, LLC	International benchmarking firm that partners with best-in-class organizations to implement innovative world-class leadership, culture, service/brand, and operational solutions.

Walt Disney World came to that awareness in the early 1990s. The economy was struggling and its competition was heating up. As the executive in charge of all operations, Lee Cockerell knew that Disney needed to reach its potential to thrive in such a difficult environment. The solution? Transform the culture. "It's about creating a great inclusive environment for the cast members [employees] so they want to do a great job. I made myself the chief environmentalist at Walt Disney World, so my job was to focus on the things that would help our business environment. Number one was to make sure I was involved when we selected new leaders. Great leaders create a great environment for people to do great things, . . . and everyone wants to be part of something great—both cast members and customers" (Cockerell 2009b).

Once an organization truly understands the Chain Reaction of Excellence Model strategy, it becomes obvious that any effort to transform its operations must begin with the root cause of leadership—and weave in all aspects of both its internal culture and external brand. Those who are passionate about realizing their potential get serious and commit to taking an active, strategic role in creating their results by design rather than by default.

In 2006, Starwood Hotels and Resorts realized that its impressive holdings of hotel brands (that include Westin, Sheraton, St. Regis, and W) were not operating as effectively as they could, and it launched a company-wide initiative across 900 hotels in more than 90 countries operated by more than 150,000 associates around the world. Michelle Crosby, the vice president of organizational capability, led the effort to create a branded service culture: "We had numerous different brands that we had purchased, each with their own culture and ways of doing business. Internally, different functions across brands weren't connected with each other which limited effectiveness. We realized that we needed to find a way to align everyone that tiered up, not just within a single hotel, but among all hotels in that brand. We then expanded that thinking to include aligning all the Starwood brands so they would compliment each other with strong hotel brand but also unify under the Starwood corporate banner—realizing efficiencies throughout the entire corporation" (Crosby 2009).

For Con-way Inc., a $5 billion freight transportation and logistics services company, the interest in leadership competencies was sparked by an epiphany during an executive meeting. Pat Jannausch, the vice president of culture and organization development, was collecting some data about retirement trends when the CEO raised the issue of succession planning. "Years ago, the leadership competencies tended to focus on personality and making your numbers" jokes Jannausch. "We soon realized that our leadership hiring and promoting process was based too much on gut instinct and not enough on a more formal approach that included seeking out and testing for specific leadership competencies. We have since developed leadership criteria for succession planning and are continually expanding this effort to include every facet of the Con-way culture—from hiring to retiring. What we've done

is definitely not something that is typical for a company in the transportation and shipping industry" (Jannausch 2009).

Accomplishing extraordinary long-term results demands a sustainable, comprehensive, and fully integrated plan. Many organizations use a rollout plan similar to the Competency Engagement Plan Checklist, which consists of seven steps:

1. Assemble the team and clarify the core.
2. Document all relevant processes.
3. Create an initial competency list and categorize.
4. Secure team validation and buy-in.
5. Connect to the operation.
6. Create an accountability infrastructure.
7. Revisit, learn, celebrate, and improve.

Each of these steps is directly connected to the Chain Reaction of Excellence Model—strategically reinforcing the links of the process to optimize the results at the end of the formula.

Step 1: Creating the Core

Step 1 of the implementation plan is to gather a focus group of influential role models from all parts of the organization to serve as a task force. It is critical that all functions of the organization are represented. "This isn't (human resources) work, though they facilitate it. It's really the operations that must own it. That's where the results are measured" (Crosby 2009). One of the key insights from the most successful world-class organizations is that any competencies must be aligned with the core components of the organizational culture. The degree of organizational integrity is completely dependent on the degree of alignment every part of the organization has with the core. The core consists of the components of the culture, such as the values, vision, mission, operational guidelines, and so forth. The significance of this first step is critical to the success of the entire organization transformation effort.

One reason that so many change initiatives fail is because they become just another complicated responsibility added to the leaders "plate." Consider this brief analogy from the book *Lead with Your Customer:* If someone has a plate piled full of cooked noodles and you were to add yet another serving of cooked noodles on top of the mound, what would be the natural consequences? Unless you were to hold the noodles on, they would slide off the plate. The same dynamic occurs when people have additional responsibilities forced onto their already-full workload as part of a new initiative (as a matter of fact, we often hear

people say that their "plate is already full"). The new program may last for some months, but eventually, when the effort of "holding the noodles on the plate" cannot continue, the noodles fall off the plate.

What world-class businesses do differently and better is that they take the organization's nonnegotiable aspects—the things that should never change, like its vision and values—and make them "the plate." The key is to design the core of your company so that it is dependably reliable and valid. There will always be things in the environment that are changing—like the economy, your competition, social issues, technology changes, and new competition—that will require attention, but when the core is set, all that additional time and effort can be reinvested into handling the issues on the plate (Jones and Kober 2010). Gerard Pierce, the senior vice president of Wegmans Supermarkets, ranked one of the best places to work by *Fortune* magazine, states that their core (known as the "Four Ws": What we believe, Who we are, What we do, and What we measure) is "the road map for our business plan. Having a common goal that is clearly understood by everyone makes sure we are all moving toward the same goals—even though we may start from different places" (Pierce 2009). "Follow the customer from two steps ahead" is a Wegmans saying that illustrates its ongoing commitment to staying focused on the customer at all times while anticipating their wants and exceeding their expectations (Meath 2009).

Once you have established the core, you can move to step 2, which is to begin documenting and understanding what people in your organization do on a day-to-day basis.

Step 2: That Voodoo That You Do So Well

Whereas Step 1 addresses the purpose of why particular competencies should be embraced, step 2 begins to identify the deliverables required of your business. This helps set the stage for exploring what knowledge and skills are specifically needed in your unique operation to successfully complete the processes of step 2.

This process and deliverable review is most effective when considered not only from the company's perspective but also from that of the customer. Not only does this activity create insights about the integrity between the company's core and the organizational culture, but it also identifies alignment with your brand. Ultimately, the goal is to exceed expectations while making it easy to do business with you—inside and out.

Step 3: Getting Competent about Competencies

Step 3 is when you will begin to create the initial list of competencies most relevant to your unique organization. One way to think about this is that the most successful companies review their internal best practices and let them identify which competencies fit

them best, rather than force-fitting generic leader characteristics onto their culture. To illustrate this, table 12-2 gives many of the competencies commonly found in organizations all around the world.

The one remarkable fact about these concepts is that they actually reflect an elementary school student profile. Isn't it interesting how expectations of human nature apply to people of all ages? Leaders, as role models, "are expected to perform the same kinds of competencies as younger people"—just on a different level (Cockerell 2009b).

The goal of this step is not so much what competencies other organizations use but more why you want to be competent in a particular area. This step is also about how implementing the right competency for you will improve how you consistently achieve results by exceeding the expectations of your employees and your customers.

Numerous methods are used to brainstorm concepts—most involve decks of cards that are discussed and sorted through a series of forced-choice selections. The goal here is to begin the discussion about the concepts and their importance as part of how you produce your most important deliverables.

One vital criterion at this phase is to keep it very simple. Just the most critical competencies should make the cut. "It's easy to be complicated. It's much harder to distill down to what really matters" (Crosby 2009). An effective rule of thumb is to "consider current role models of excellence as a template for the competence level for everyone in that role, and then articulate that clearly for every member of that organization" (Diaz 2009).

Imagine that everyone on your team had the knowledge and abilities of your star leader. That is the value of developing competencies with the right fit for your unique operation. The final aspect of step 3 is to place the draft competencies into collections of likeminded categories, for maximum simplification of competencies critical for success. This is typically the final act of the original one- or two-day task force meeting. What you want to avoid at all costs is having the executive group create the competencies and hand them off to be implemented. According to Jack Roddy, director of partner resources at Starbucks, getting only the executive team to approve the competencies is "a false 'promised land.'

Table 12-2. Sample Competencies

Principled	Inquiring	Caring	Tolerance	Open-minded
Integrity	Thinking	Enthusiastic	Respect	Risk taking
Committed	Creative	Communicating	Empathetic	Confident
Well balanced	Reflective	Independent	Cooperative	Curious

The intent of the competencies is to be used as a tool by the people out in the operation running the company. If those out in the field don't buy-in, you don't have anything" (Roddy 2009).

Step 4: Getting Engaged

Step 4 is the initial effort to share the decisions made by the task force and get the rest of the company (at the lowest appropriate level) involved in generating feedback. This also is an informal validation step to test the work of the task force for both the operational aspects and the planned accountability methods. The bottom line: "If you don't connect correctly, you haven't done your job" (Roddy 2009).

One reason to use influential team members who are well-respected in the task force is how they interact with the rest of their teams during this step. Having these informal leaders accessible to explain their decisions and show genuine support for the competency tool generates confidence and a sense of control by the rest of the team.

Another valuable benefit of involving people throughout the organization early is that they get the chance to be involved in the process. Not only does the company gain their feedback for a more valid tool, but their involvement also creates ownership and buy-in to the process—making it more likely that they will support the implementation phase.

Step 5: Execution, in a Good Way

Step 5 consists of taking the refined and final product of step 4 and using the new competencies as an aligning filter for every aspect of the organization. Once you have the road map (the core), every role and function in the operation must align to optimize integrity. The consequence of this step is consolidation of your support resources—you are consistently reinforcing the same types of efforts for the same reasons.

One way to design and develop this step is to do a process map of your employees as well as your customers. Every experience requires some kind of knowledge or behavior to execute. Compile these touch points and the corresponding competencies to determine expectations—and what will exceed expectations—in each instance.

Remember to do the difficult work of distilling down everything to its essence and make it as simple as possible. If the process is too unwieldy to be realistically and consistently implemented in day-to-day operations, the plan will soon give way to the previous, less effective approach. This is the time to be audacious, disciplined, and committed. The reason for initiating the improvement effort is because the ordinary approach is no longer acceptable.

Step 6: Accountability

Step 6 occurs in tandem with step 5. As the new processes and procedures are rolling out, the accountability systems should be implemented as well. "Management must be measured on the values of the organization. A lot of companies have their values posted on the wall, but if employees can't see the values in their manager or their fellow workers, then those values really don't exist" (Pierce 2009). Anne Meath (2009), Wegmans' director of organization development, adds that "the real differentiator is the demonstration of values."

Clarifying the specific goals and how your entire team will work together to achieve them must be measured to serve as an objective road map for everyone's guidance. This feedback infrastructure is the lifeblood of any sustainable system.

The benchmark accounting firm Wipfli has an interesting approach to providing information as part of its performance management system. "One tool that has been helpful is using a positive rubric at all levels when assessing performance. We use a traditional Likert scale to rate associate, but instead of describing negative behaviors with the lowest two numbers, we decided to have all five numbers reflect varying degrees of positive outcomes for that competency. It's a practical application of the now famous transition from 'good to great'" (Diaz 2009).

Just as with any transition, more care must be taken to ensure a nurturing environment supports the learning curve of the competency or improvement initiative. The changes will assuredly create some level of confusion, anxiety, and intense emotions as people adjust. Fortunately, the need to provide justification for decisions and behavior parameters consistently leads back to the newly established core. Because there are now direct links between results, knowledge, and behaviors for service and culture and the new leadership competencies, there is natural motivation for anyone who cares about the core (values, vision, and mission). Accountability support systems reinforce the methods and results that everyone aligned with the newly stated direction desires.

Step 7: Making Common Sense Common Practice

Step 7 is the flywheel that keeps the process moving forward, building momentum with each cycle and nurturing the effort each and every day: "It takes time. Changing an organizational culture is like cleaning up a polluted lake. At first, it starts off muddy and murky, but with discipline and commitment, it eventually gets clearer and drinkable again. With people, they more trust, more engaged, and eventually get happy from providing extraordinary service to their guests" (Cockerell 2009b). Make the effort to revisit the purpose, process, and payoff of the "new normal." Reminders that are part of the typical day-to-day operation—daily team huddles, weekly department meetings, monthly newsletters, and so on—maintain the urgency and motivation to continue the improvement process. These opportunities allow for two-way

communication so everyone can continuously learn from the process and celebrate—both the successes and the failures along the way. "One of the activities we've done consistently over the years with the highest return on investment is to have extended leadership sessions and simply talk about how we can better live the values" (Pierce 2009).

In his book *Creating Magic,* Lee Cockerell (2009a, 263) comments on his experiences during this part of the process: "As a leader, you have to make many tough choices, and that process starts now. And when making those tough decisions, always consider their impact on each leg of what Disney calls the three-legged stool: guests (customers), cast members (employees), and business results. By clearly thinking through the effect your choices will have on these three legs, you are taking everyone's concerns into account. Once you do, go ahead and make your decision and act on it."

Finally, in addition to gathering insights, sharing those insights throughout the organization leverages the benefits exponentially. If a leader's responsibility is to grow the business, then by definition, growing employees' competence is a nonnegotiable requirement. Building competence is the literal intent of leadership competencies, but many lose sight of this when it comes to the rest of the organization.

Ending at the Beginning

Identifying leadership competencies is too often used as a superficial tool to select, develop, and hold leaders accountable for compensation purposes. But the most successful world-class organizations realize the opportunity to expand well beyond that limiting perspective, and they apply the effort to building competence throughout the company—for a transformational shift toward future achievements.

The act of identifying relevant competencies that are the right fit for the leaders of an organization should be the start of a fresh, new beginning for all its operations. An organization's leader is a role model who ultimately influences its internal culture, external brand, and financial results. Approached strategically, identifying and implementing the right leadership competencies that work for your organization will help you achieve the same kinds of proven results achieved by the world's most renowned organizations.

Further Reading

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About the Author

Mark David Jones is currently the president of Small World Alliance, leading a team of former Disney leaders to help corporations achieve business excellence. Before this venture, his 26-year career with the Walt Disney Company involved numerous leadership roles, including being responsible for customer service, creativity and innovation, and leadership initiatives. In recognition of his contributions, he was nominated for Disney's highest corporate accolade, the Partners in Excellence Award. His business transformation work with dozens of *Fortune* 500 companies is showcased in his book *Lead with Your Customer: Transforming Culture and Brand into World-Class Excellence,* published by ASTD Press.