Through interviews, 24 leadership-development (LD) experts explain:

⇒ How they help professionals strengthen their leadership
⇒ The challenges that interfere with LD
⇒ How LD is changing

Includes recommended reading.
The graduate students thank the 24 LD professionals who gave us their time to interview them. Their willingness to share and their stewardship made this whitepaper possible.
The Content

Overview
1. About this Whitepaper ........................................ 5
2. About the Interviewees ......................................... 6-9
3. LD Definition ..................................................... 10-11
4. Learner Barriers .................................................. 12

Interventions
5. Intervention Goals .............................................. 14
6. Typical Interventions .......................................... 15
7. Effective Interventions ......................................... 16
8. Learning Barriers ............................................... 17

Appendices
Interview Questions ............................................... 21
Recommended Reading ......................................... 22-23
The Authors ......................................................... 24
About the Course .................................................. 25
About the Program ............................................... 26

Data source
• Interview of 24 LD Experts
Overview
1. About the Whitepaper

During the 2021 Summer term, 22 graduate students completed a leadership and management course as partial fulfillment of the Learning, Design and Technology Program at the University of North Carolina at Charlotte.

During the course, we interviewed 24 LD experts to learn about their role and thoughts about the LD field. We asked nine questions (one with three parts), and a team compiled the initial findings.

After the university’s Institutional Review Board (IRB) approved using the course interview data for publication and after obtaining interviewees’ consent, Gary DePaul, our professor, added some compilations and drafted the white paper.

This white paper summarizes our findings.

Throughout the whitepaper are dark green callout boxes with interviewees’ paraphrased comments. (not necessarily direct quotations)

LD refers to leadership development.
Commonality

Using an inductive approach, a doctoral student team analyzed 24 interview summaries to find commonalities among the LD professionals’ experiences.

Although interviewee experience varied, the team identified themes from each question.

The team created a word cloud using the interview summaries of the nine questions. The most frequently used words related to LD were the following.

<table>
<thead>
<tr>
<th>Word used</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership</td>
<td>148</td>
</tr>
<tr>
<td>People</td>
<td>107</td>
</tr>
<tr>
<td>Development</td>
<td>97</td>
</tr>
<tr>
<td>Learning</td>
<td>75</td>
</tr>
<tr>
<td>Training</td>
<td>62</td>
</tr>
<tr>
<td>Leaders</td>
<td>59</td>
</tr>
</tbody>
</table>
Interviewee Years of Experience

Students interviewed 24 LD experts and found that they have:
- 521 Combined years of experience
- A range of experience from 7 to 50 years
- An average of 22 years of experience

Interviewees noted that they had difficulty pinpointing exactly when their LD experience began.

One interviewee, a self-proclaimed *leadership nerd*, joked that their LD experience began in kindergarten as they encouraged classmates to stay at the desk while teachers were out of the classroom.

**Interviewee LD Role Descriptions**

Interviewees described themselves as having one or more LD roles.
- Own their own LD business
- Work in their organization’s training departments
- Contract with organizations to develop training

While not specifically asked, 11 interviewees published books or blogs about leadership.

<table>
<thead>
<tr>
<th>LD roles</th>
<th>Number of references</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide LD training</td>
<td>12</td>
</tr>
<tr>
<td>Coach, guide, or facilitate learning</td>
<td>9</td>
</tr>
<tr>
<td>Strengthen Influence capabilities</td>
<td>4</td>
</tr>
<tr>
<td>Model leadership behaviors</td>
<td>3</td>
</tr>
<tr>
<td>Motivate or build relationships</td>
<td>3</td>
</tr>
<tr>
<td>Facilitate keynote or motivational talks</td>
<td>2</td>
</tr>
<tr>
<td>Provide assessments/feedback</td>
<td>11</td>
</tr>
</tbody>
</table>
The interviewees have unique journeys that led them to become LD experts. While different, they share some commonalities.

Interviewees have had a variety of diverse experiences in their personal and professional lives, including:

- Military and humanitarian services
- Multiple jobs in a field and being asked to share their journeys with others

Others had positive LD training experiences and loved the process, which inspired them to seek more LD training and opportunities.

A few had negative experiences with managers and wanted to ensure that the next generation would have more positive interactions.

Some were positively influenced by people in their lives, which led them to develop their LD expertise. Positive influencers included mentors, coaches, and others in their professional networks.
Many of the professionals we interviewed were humble in their responses on how they became experts in the LD field.

More than half credited their status to their work experience.

Quite a few credited their expertise to formal and informal learning, such as college-level classes, conferences and workshops, books, and podcasts.

Some explained that their experiences with poor role models or good mentors helped to find their way into the LD field.

A few also noted the role of reflection in their journey to become LD experts.

<table>
<thead>
<tr>
<th>Interviewee LD development</th>
<th>Number of references</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work experience (includes trial-and-error)</td>
<td>13</td>
</tr>
<tr>
<td>Professional development training</td>
<td>12</td>
</tr>
<tr>
<td>Poor role model / good mentor</td>
<td>8</td>
</tr>
<tr>
<td>Reflection</td>
<td>2</td>
</tr>
</tbody>
</table>

Every experience is a new experience and has provided an opportunity for self-study.

Once the curiosity for LD emerged, it became apparent that developing people from the inside-out was my professional and personal purpose.

I learned purely on the job, from workshops, conferences, and memberships with organizations such as ATD, because companies paid for these resources back then.
3. LD Definition

Most of the respondents think broadly about the definition. For them, LD is about helping people learn the behaviors and beliefs needed to lead effectively.

LD involves processes, tools, and resources to support employees’ capabilities for meeting the needs of their teams, departments, and organizations.

I think LD is a journey. I don’t see it as a one-time event.

LD is all about understanding how to strip away someone’s limiting beliefs and impart the empowering ones.

LD can be categorized in two ways. First, operationally such as performance management and reviews (managerial skills). Secondly, leadership skills or soft skills such as building trust and having political conversations.

<table>
<thead>
<tr>
<th>Definition categories</th>
<th>Number of references</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop employee skills</td>
<td>16</td>
</tr>
<tr>
<td>Develop ability to influence</td>
<td>3</td>
</tr>
<tr>
<td>Empowerment</td>
<td>2</td>
</tr>
<tr>
<td>Understanding self</td>
<td>2</td>
</tr>
<tr>
<td>Building teams</td>
<td>1</td>
</tr>
<tr>
<td>Goal alignment</td>
<td>1</td>
</tr>
<tr>
<td>Creating a positive work atmosphere</td>
<td>1</td>
</tr>
</tbody>
</table>
Three interviewees defined LD as processes or techniques for developing how employees influence. Some described LD as developing the ability to empower others, build self-understanding, help others align goals, and create a positive work environment.

LD is a variety of ways in which anyone, not just a leader, can hone and get better at various skills to manage effectively.

LD helps leaders build high-performance teams to meet organizational goals by strengthening their leadership skillset and leveraging tools. Through LD, leaders learn how to remove roadblocks and remove themselves from taking on the attention. They need to develop skills that don’t block creativity.

The end goal is efficient and effective leadership.
4. Learner barriers

Why are some professionals unable to lead? Interviewees identified several concerns.

The most substantial is the lack of knowledge about what leadership is and how to lead effectively.

For many, leadership isn’t intuitive, and using trial-and-error learning is limiting.

<table>
<thead>
<tr>
<th>Barriers to Leading Effectively</th>
<th>Number of references</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge/skill gaps</td>
<td>15</td>
</tr>
<tr>
<td>Not enough time / competing priorities</td>
<td>6</td>
</tr>
<tr>
<td>Resist giving and receiving feedback</td>
<td>6</td>
</tr>
<tr>
<td>Desire to maintain control</td>
<td>4</td>
</tr>
<tr>
<td>Ego</td>
<td>3</td>
</tr>
<tr>
<td>Lack of commitment</td>
<td>2</td>
</tr>
<tr>
<td>Weak perception and self-awareness</td>
<td>3</td>
</tr>
</tbody>
</table>

The biggest barrier is time. That is because learners are busy trying to run the business.

There is a tendency to become a Super-Doer. When one sees things going wrong, they know how to do the tasks and are recognized for doing it before. They aren’t coaching or delegating. They are doing.

People aren’t given feedback and assume what they are doing is working. Sometimes, many times, people don’t want to be coached. They don’t think they are the problem or that they need to improve.
Part 2

Interventions
5. Intervention Goals

Interviewees were reluctant to state typical goals for interventions. Instead, most interviewees emphasized that goals should be based on some type of assessment.

Some explained that goals can depend on variables such as career level, current leadership capabilities, and organizational needs.

We want leaders to take 360° feedback, put it into action, and reassess to see improvement.

The path depends on the context and the organizational culture. You can do something highly effective on one agency that fails flat in another.

My first step is to help people develop a vision of what they want to achieve personally and professionally. Next, I help them create goals to reach that vision. Then, what are the plans to be developed to reach the goals?

LD is a process that involves many aspects of the company or workforce. Managers need to influence others positively. Employees need to be engaged, be positive, step up, and show interest.

It varies by leader. I try to make goals unique to get the best results and to develop appropriately.

<table>
<thead>
<tr>
<th>Intervention goals</th>
<th>Number of references</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify their goals/priorities/competencies</td>
<td>13</td>
</tr>
<tr>
<td>Feedback/360-degree feedback</td>
<td>7</td>
</tr>
<tr>
<td>Identify areas for improvement</td>
<td>7</td>
</tr>
<tr>
<td>Perform assessments</td>
<td>7</td>
</tr>
<tr>
<td>Self-awareness</td>
<td>3</td>
</tr>
<tr>
<td>Focus on learning transfer</td>
<td>4</td>
</tr>
<tr>
<td>Motivation</td>
<td>2</td>
</tr>
</tbody>
</table>
Interviewees made it clear: selecting LD interventions depends on several factors. These include:

• What is needed to reduce performance gaps or achieve learning goals
• (If external) What clients will tolerate
• The environment needed for learning to be effective

Many explained that they may rely on several different interventions to achieve the goals. For example, one program could include:

• Reading assignments
• Asynchronous eLearning for content
• Synchronous (virtual or in-person) for practice
• Follow-up coaching sessions

Several interviewees noted that the pandemic caused a shift to leveraging more virtual events than in-person.

I use surveys and interviews to understand how to tailor training to meet organizational needs. I start with pre-reading or eLearning to prime people for my three-day workshop. The workshops are based on experiential learning – less about lecturing and more about doing. I follow-up with 2-3 coaching sessions with each participant.

I’m moving away from in-person except where in-person is really needed. I’m creating digital learning for subjects not needed in a classroom.

Synchronous is best for facilitation and discussion.

Interventions depend on the organization’s appetite for the expense and time away from work. I often implement a long series of 6-8 piece hybrid programs that spread over 4-6 months so that learners can try things out.

<table>
<thead>
<tr>
<th>Interventions types</th>
<th>Number of references</th>
</tr>
</thead>
<tbody>
<tr>
<td>It depends (gap analysis)</td>
<td>19</td>
</tr>
<tr>
<td>In-person or face-to-face</td>
<td>15</td>
</tr>
<tr>
<td>Virtual (synchronous or asynchronous)</td>
<td>11</td>
</tr>
<tr>
<td>Coaching</td>
<td>9</td>
</tr>
</tbody>
</table>
7. Effective Interventions

Interviewees agree that effective interventions achieve their intended results. Some emphasized that you need to measure interventions to know if they are effective.

Some interviewees restated that to identify desired results, you need to analyze the gaps. For example, one interviewee who facilitates keynotes spends several hours meeting with clients to understand the audience's performance gaps.

Some interviewees were descriptive: effective interventions result in growth transformation. For that to happen, learners need to be open-minded, receptive to feedback, willing to be coached, and committed to practicing new leadership skills.

<table>
<thead>
<tr>
<th>What makes interventions effective</th>
<th>Number of references</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feedback/Coaching</td>
<td>8</td>
</tr>
<tr>
<td>Motivation for change</td>
<td>8</td>
</tr>
<tr>
<td>Identifying goals, needs, and challenges</td>
<td>6</td>
</tr>
<tr>
<td>Transformative/opportunity for growth</td>
<td>6</td>
</tr>
<tr>
<td>Achieve intended outcome or results</td>
<td>5</td>
</tr>
<tr>
<td>Tailored skill development</td>
<td>3</td>
</tr>
<tr>
<td>Measured results</td>
<td>3</td>
</tr>
<tr>
<td>Safe learning/trusting environment</td>
<td>3</td>
</tr>
<tr>
<td>Inspires continuous learning</td>
<td>2</td>
</tr>
</tbody>
</table>

Participants also need more than a one-and-done workshop with follow-up opportunities, coaching, and perhaps shorter refresher training to keep them on the path toward their commitments.

Effective LD interventions take inventory of business needs and the gaps along with a commitment from the learners. This requires tools to identify appropriate interventions and set a baseline for participants.

Most LD programs do not have the right intended outcome: it is a problem.
8. Learning Barriers

For interviewees, barriers to learning include personal factors, time, and not being committed to or resistant to change.

One interviewee commented that, after LD interventions, clients fail to sustain leadership changes, which implies that more needs to be done.

The greatest barrier is time. We get so busy with our daily activities. Taking an hour or a day for LD takes away from our daily activities. LD quickly becomes the thing that you push to the back.

Leadership is not like technical training. It's complex with many, many elements and involves deeply held beliefs and a lifetime of habits that you are trying to change. LD does not fit neatly into the corporate mentality of having to solve it now.

Clients don’t realize how hard it is. They think it is a secret sauce when it really is not. It is work. Learners must invest in themselves and in the processes. They need to get outside of their comfort zones.

Some learners aren’t willing but are "voluntold" to enroll in a coaching engagement, so they are resistant or think they know it all.

<table>
<thead>
<tr>
<th>Barriers</th>
<th>Number of references</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal (mindset, lack of desire, fears, and lack of self-awareness)</td>
<td>14</td>
</tr>
<tr>
<td>Time (limits and lack of)</td>
<td>11</td>
</tr>
<tr>
<td>Change (not committed to change or resist changing)</td>
<td>9</td>
</tr>
</tbody>
</table>
9. How LD Is Changing

Many interviewees commented that, because of the pandemic, LD professionals have transitioned more interventions to virtual. While some are still in-person, many keynotes and coaching sessions are now virtual.

The LD content has changed. There is an increased emphasis on the human side of LD: emotional intelligence, psychological safety, and mindfulness. Two noted an increased focus on diversity, equity, and inclusion.

Because interviewees had a lot to discuss about LD changes, we included more paraphrased comments on the next page.

<table>
<thead>
<tr>
<th>Changes in LD</th>
<th>Number of references</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shift to virtual delivery</td>
<td>12</td>
</tr>
<tr>
<td>Increased importance of LD and Ongoing LD</td>
<td>5</td>
</tr>
<tr>
<td>Learner-centric content</td>
<td>4</td>
</tr>
<tr>
<td>Increased focus on self, vulnerability, and Emotional Intelligence</td>
<td>4</td>
</tr>
<tr>
<td>Micro-lessons</td>
<td>2</td>
</tr>
<tr>
<td>Increased focus on diversity</td>
<td>2</td>
</tr>
</tbody>
</table>

Technology has been a game-changer. Previously and especially before the pandemic, LD required lots of public speaking to large audiences. That delivery model may not ever exist again. With live streaming, we may have half an hour to share information.
Covid 19 and lockdowns changed a lot. We are doing things we didn’t know we could do online. We moved ahead ten years in a period of six months. We are making advancements in leaders and helping them understand that their people are not their problem. A lot of what is called LD is expensive entertainment and hasn’t shown to be effective. On the positive side (less flavor of the month, less everyone needs to take Myers Briggs), LD is becoming more thoughtful. Coaching is more personal. Managers tell me how, and a coach helps me understand why.

Through the 1980s and early part of the ‘90s, there was no real focus on LD. It was all about management training. Beginning around ‘94/’95, GE pushed for LD to change organizational performance.

In ’95, Emotional Intelligence came onto the scene and took approximately 10 to 15 years to take hold. In 2007, Carol Dweck’s book about mindset is just now coming onto the scene in leadership.

We are on the cusp of awareness around motivational intelligence and mindset. Leading-edge companies are focusing on those concepts because they change the way business grows.
Part 3

Appendices
Interview Questions

The following are the questions we asked interviewees. They are listed in the order that we asked them:

1. How long have you been involved in the leadership-development field?
2. How do you personally define “leadership development?”
3. How would you describe:
   a. Your role in developing leadership?
   b. Your journey that has led you to your role?
   c. How did you learn to become a leadership development expert?
4. For the people you help (clients, customers, employees), what are some of the barriers that prevent them from leading effectively?
5. What are typical goals that you have for your leadership development training programs or for coaching clients?
6. How would you describe the interventions that you use to train or coach clients? (E.g., intervention types, duration, synchronous/asynchronous, in-person or virtual, any set sequences)
7. From your experiences, what do you find challenging when trying to help clients develop their leadership?
8. What makes an effective leadership development intervention?
9. How have you seen the leadership development profession change within the last few years?
Recommended Reading


Recommended Reading (continued)


# The Authors

## Doctoral Students
- Jasmine Bishop
- Katrina Green
- Karen Ingram
- Kimberly Laney
- Janet Morse
- Heather Ramsey
- Darlene M. Schaefer
- Liane She

## Master’s Students
- Jennifer Bosworth
- Victoria Caviness
- David Foster
- Laura Hess
- Paul Jensen
- Wendy King
- Christian Miller
- Babetta Popoff
- Luke Rosequist
- Jess Taylor
- Brianna Tieber
- Nicolas Vogel
- Amber Wood

## Research Support, Editing, and Production
- Gary A. DePaul, PhD, Adjunct Professor

---

## Images sources
1. University of North Carolina at Charlotte
2. Other images sourced and licensed to Gary DePaul through envatoelements
About the Course

EIST-6000 and EIST-8000
Summer 2021 Second Half Term
Topics in Learning Design and Technology: Leadership and Management in Learning, Design and Technology

Whether in corporate America or school administration, too many professionals cannot distinguish the difference between leadership and management. Much of this confusion is due to semantics and how professionals misuse the terms. In EIST-6000 and EIST-8000, you'll learn the distinction. You'll also learn:

• How leadership has evolved in the 21st Century
• How traditional leadership differs from 21st Century leadership and why
• What the categories of management are
• How leadership development and leadership training differ
• How coaching relates to leadership
• What every learning technologist and developer should know about project management

Throughout the course, you will learn about principles, underlying beliefs, practices, and various models. You will meet practitioners and learn their insights into different aspects of leadership and management.
The Learning, Design and Technology academic concentration is part of the Department of Educational Leadership.

Learning, Design and Technology Program: https://edld.uncc.edu/programs/learning-design-and-technology-program-0
Department of Educational Leadership: https://edld.uncc.edu
University of North Carolina at Charlotte: https://www.uncc.edu

About the Graduate Program

Our program is Quality Matters certified in program design and learner success. https://www.qualitymatters.org

Our program is endorsed by the Association of Education Communications Technology (AECT). https://www.aect.org

Our program was ranked 1st in North Carolina and 13th in the nation among educational media programs by US News and World report in 2021. https://www.usnews.com/education/online-education/education/online-instructional-media-design-rankings