



Case Study

From Concept to Reality – Developing Managers into Leaders

The Situation: Many organizations consider the transformational leadership approach for management as a way to increase competitiveness, sustain growth and develop employee talents further. TidalShift believes a leadership development in conjunction with project management skill development will enable leaders to engage people and execute strategic initiatives. In 2011, one of Canada's leading insurance and financial services company wanted to implement a leadership program targeted at middle managers to enhance their leadership capability, skills, knowledge and behaviors required to support the achievement of current and future business outcomes. The successful program would focus on three topic categories: Business Case Development, Strategies for Execution and Project Management.

The Challenge: Being a nation-wide insurance and financial services company with multiple locations brings a unique and diverse corporate environment. To deliver a more consistent approach of project management and leadership, a leadership program needed to be developed. The program would be targeted to middle management – Managers and Senior Managers. TidalShift partnered with the client to identify core deliverables needed to develop a learning program that met the unique needs of the corporation while maintaining compliance with industry standards and best practices from the Project Management Institute™. The successful learning program needed to focus on effective and efficient management of business initiatives to close

the gap between concept formulation and strategic execution. In addition, the program could not be delivered as an intensive, consecutive course since participants needed to balance their workloads and operations. Maintaining the same group of participants together for the duration of the program was a potential challenge. However, it was felt that delivering the program over three months would enable attendees the time to apply their learning.

The Approach: A needs assessment was conducted internally. TidalShift was hired to develop a leadership program based on the results. TidalShift partnered with the client to develop an interactive program that started off with a business case, followed by individual project application and then introduced the process for strategy execution. The program was offered sequentially and each course would build upon the previous session. A classroom delivery approach was decided as the best way to interact with participants and increase their skills as well as change behaviours. Experienced facilitators with specific industry experience were engaged to deliver the program to incorporate client specific examples. A customized financial case study was developed to increase relevancy for the participants and assist in improving job application. In between each session, participants had to demonstrate application of their knowledge on the job and report back on their progress at the beginning of the subsequent session. As part of post learning support, TidalShift partnered with internal partners to encourage transfer of learning, in addition to providing access to supplemental content through an online members' only portal.

Results

The pilot of the program, made up of 20 participants, was so successful that TidalShift has further partnered with the company to offer the program on an ongoing basis. To date, two cohorts have completed the program and a third cohort in the fall of 2012. A consistent approach to leadership has been created to optimize project and people development. Participants found the customized financial case study to be relevant, practical and had direct application to their work. In addition, the program has been expanded to the United States for delivery.