

# DEVELOPING SUCCESSFUL EXECUTIVE EDUCATION FACULTY: A REVIEW OF THE LITERATURE FROM 2001-2011

A UNICON Research Report

Elizabeth Weldon, PhD

## OVERVIEW

This literature review provides valuable information about the insights, skills and tools that executive education faculty need to succeed. Twenty-one key insights, 11 skills and 45 tools and techniques were identified. Developmental programs should be designed to help executive education faculty acquire these insights, learn to use these tools and techniques, and build these skills.

## DEVELOPING SUCCESSFUL EXECUTIVE EDUCATION FACULTY: A REVIEW OF THE LITERATURE FROM 2001-2011

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This literature review was conducted to help answer the question: What can UNICON members do to help their faculties build strong executive teaching skills?

I reviewed articles published in the last 10 years covering these elements of executive education:

- client needs,
- the participant experience,
- effective classroom techniques, and
- the characteristics of successful executive education teachers.

I did not review articles focused on distance learning, e-learning and blended learning, because a recent UNICON research project covered these topics. The articles I reviewed are listed at the end of this document.

I organized what I learned into 3 categories:

1. what faculty need to know about executive development and the business of executive education,
2. tools and techniques that executive education faculty can use to design and deliver successful executive education learning experiences, and
3. skills that faculty need to design and deliver successful executive education learning experiences.

In Parts 1, 2, and 3 of this report, I summarize the literature on these three topics. Sources are noted in parentheses. You can refer to these sources for additional information.

In Part 4, I summarize what we have learned from this review and how it can be used to develop executive education faculty.

## PART 1. WHAT FACULTY NEED TO KNOW ABOUT EXECUTIVE DEVELOPMENT AND THE BUSINESS OF EXECUTIVE EDUCATION

These key points about executive development and executive education provide the conceptual understanding that faculty need to design and deliver successful executive education learning experiences. Faculty working in executive education should understand these issues.

### **A good faculty is at the heart of the business school executive education value proposition.**

The quality of the faculty is a key consideration when clients choose an executive education partner. (6) (9) (19) (20) In a recent UNICON survey of executive education customers, 41% of the respondents said that faculty quality was the number one reason they chose to work with their executive education partners. (16)

### **Faculty are increasingly expected to have broad multidisciplinary knowledge.** (19)

### **Faculty are increasingly expected to understand organization dynamics and business strategy.** (18)

### **Clients who work with business schools want programs grounded in research.** (6)

To this end, many top schools treat research as a key element of the executive education value chain, and they make substantial investments in R&D. (9) (27) For example, at LBS, they work backwards up the value chain to identify topics that their clients are interested in, conduct research on those topics, and then design programs using the results of that research. (9) At IMD, professors translate research results into articles, books and teaching materials that describe the results in a way that managers can use. IMD invests about 30% of its annual budget in research. (27)

Some experts believe that customer-focused R&D will become an even more important differentiator among Business School executive education providers. R&D will also differentiate business schools from other providers of leadership and management development. (6)

### **Faculty research, whether theory- or problem-driven, must provide practical insights, models, frameworks and ideas that managers can use to address the challenges they face.**

Faculty must present the practical value of their research in a clear and compelling way. (16) (9) (27)

**Custom program clients want faculty to understand their business strategy and the challenges they face. (16)**

**Some custom clients want the faculty to be involved from the beginning to the end of the design and delivery process.**

In these cases, faculty work as partners in the design process. (16)

**Clients want their programs to have a tangible impact on business results.**

Programs should be designed to change the way people think and act to drive business results. (20) (6) Programs should help executives analyze the challenges they face and explore solutions to produce real world impact (6). At the end of the program, participants should be better able to make sound business decisions to drive competitive advantage. (2)

**Participants want practical ideas, models and frameworks that they can use to solve their immediate business challenges.**

Executives come to executive programs with particular business problems in mind. They are more interested in ideas with practical relevance than in broad intellectual concerns. They want lessons boiled down to terse guidelines and workable, implementable solutions. (11) Executive learners want practical and timely, real-life examples and ideas that they can use to master their business challenges. (6)

**Clients want their programs to increase engagement by re-energizing participants and building confidence in their abilities to meet the challenges they face. (16) (6)**

**Clients want their programs to build lasting relationships among participants.**

Clients want faculty to include opportunities for meaningful interaction among participants. Faculty should include activities that encourage all participants to interact. (6)

**Some clients want support before and after the formal learning experience. (2) (27)**

This support might include assessment tools, preparatory assignments, and post-program coaching. (27)

**Some clients want comprehensive and integrated solutions.**

Comprehensive solutions might include action learning, e-learning and distance delivery in addition to face-to-face classroom work. When asking for integrated solutions, clients want to link program content to their competency model, coordinate with executive coaches, and incorporate the company's

development planning tools and succession planning tools into the program. In some cases, clients want the executive education provider to provide coaches, development planning and succession planning tools. (18)

**As practiced today, executive education programs come in 5 forms which are variations on two basic types: 1) performance enhancers and 2) transformational experiences.**

1. *Performance enhancement for individuals.* These programs offer new ideas, practical examples, models and frameworks to help participants do their work better. Individual participants apply what they learn to their personal business challenges.
2. *Performance enhancement for teams.* Participants come in teams to work together on a specific initiative, project, issue or concern. (21) (27) At IMD, these programs (called Booster Programs) include plenary sessions to cover topics useful to all the teams, in addition to breakout sessions where each team works on its project with a coach. (27)
3. *Facilitated workshops to enhance performance.* A facilitated workshop is designed to help a management team analyze and generate solutions to a business challenge. In a facilitated workshop, faculty help the management team analyze and generate solutions to the problem. There is little formal instruction, although faculty provide expert knowledge as required, usually in the form of framework, models or examples of how other companies have addressed the problem. (6)
4. *Facilitated workshops for organizational transformation.* These workshops are designed to help a management team generate dramatically different ways of thinking about and doing business. Again, faculty work primarily as facilitators. When transformational change is required, faculty must be prepared to deal with more conflict and emotion. (22)
5. *Transformational programs for individual leaders.* These programs are designed to support personal transformation (8) (27) (13). According to De Vries & Korotov (8) transformational programs provide an opportunity for leaders to take stock of their lives and careers; deal with personal issues; embark on self renewal and develop a new work identity, usually to facilitate a personal or professional transition. These programs should create a psychologically safe but stimulating environment to help executives identify the forces that drive their behavior, attend to the intrapsychic and interpersonal themes that provide stimuli for growth, identify dysfunctional behavior patterns, find

one's true self, and explore career and life options (8). De Vries & Korotov (8) provide a detailed description of a transformational open-enrollment program.

**As noted above, some clients want their executive education programs to drive change in individuals, company strategy and/or organizational processes.**

These clients want the faculty to act as change agents. (6)

**Faculty are key motivators in the learning process.**

Although responsibility for learning is shared in successful executive education programs, the faculty are the key motivators in the learning process. (27) Faculty must demonstrate passion for the subject they are teaching to build energy in the room. (27) Faculty should be positive and motivating. (16)

**How executive education is delivered is as important as what is being taught.** (16)

**Reflection is essential to executive learning.**

Learning is more powerful when participants connect their own experiences to the knowledge that the faculty provide, and this connection occurs through reflection. (21) According to Mintzberg, "The classroom should be a place where managers can reflect thoughtfully on their experience. This is not boot camp. They live boot camp every day. What they desperately need is time to step back and reflect thoughtfully on their experience." (21)

**Executive learners should be active participants in the learning process.**

The paramount role of the educator is to create an environment in which participants consider themselves to be partners in learning as opposed to receptors of knowledge. (27) Participants are active learners who must be fully engaged in the process. According to Mintzberg, there are no students in his classroom, only partners in the learning process. Participants and faculty share responsibility for the learning process. This does not mean giving up teaching and designing; rather it means ceding some power over it to the dynamics of classroom. Faculty members are facilitating rather than controlling. (21)

**Executive learners can and should learn from each other.**

According to Mintzberg, "The hardest lesson for business school professors to learn is that experienced managers have at least as much to learn from each other as they do from us." (21) To facilitate peer-learning, faculty must recognize and value the experience that executives bring. (27)

**Participants like for faculty to use a variety of learning methods.**

Effective programs incorporate lecture, case discussion, videos, business simulations, role-play, small group breakout sessions and group presentations. (6) Effective faculty are creative when choosing delivery methods. (19) (6)

**Executive education is different from MBA teaching.**

Full time MBA students and executive learners have very different interests and needs. For this reason, teaching objectives and teaching style differ for these two groups. (11) Garvin (11) describes the many ways that MBA and executive teaching differ.

**Faculty must establish credibility while demonstrating humility and mutual respect. (27)**

PART 2. TOOLS AND TECHNIQUES

This is a list of tools and techniques that faculty can use to deliver successful executive education experiences. This list includes:

- non-traditional learning processes;
- techniques for building relationships among participants,
- techniques to help participants learn from each other;
- tips for sharing responsibility for learning with the participants,
- techniques to help participants transfer learning to the workplace, and
- specific activities and exercises that faculty might use.

**Analogically situated experience (ASE).** An ASE is an experiential activity asking participants to adopt an unfamiliar role in a novel context (e.g., learning to play basketball). The activities in an effective ASE will be distinctly different from normal work activities, but the deep structures of the ASE and work demands will be similar (e.g., the need for communication and teamwork). Because the situation is novel, participants learn with a fresh perspective, gaining new insights into their work. Success depends on the similarity of the deep structures and careful debriefing to tie the experience back to their work. Houde (14) provides detailed guidelines for designing an ASE. Duke CE provides examples. (30)

**Service learning.** Service Learning is an educational methodology combining classroom study with the practical experience of working with a community seeking to resolve a problem or issue. For example, Pless, Maak & Stahl (24) describe a service-learning program designed to develop responsible global leaders, which involves sending participants in teams to developing countries to work in cross-sector partnerships with NGOs, social entrepreneurs or

international organizations. According to Pless et al, this international service learning program develops competencies that are critical for responsible global leadership. (24) (6)

**Arts-based learning.** Arts based learning is used to help managers and professionals to think artfully and creatively about what they do. Learners engage with artists and arts practices as a vehicle for learning. According to its practitioners, arts-based learning offers new insights, different perspectives and provides new approaches for decision-making and solution-finding. Nissley (23) provides examples of how schools and companies are using arts-based learning. Nissley also provides a bibliography describing approaches to arts-based learning. In addition, you can collect more information at the Banff Center for Continuing Education ([www.banffcentre.ca/departments/leadership/](http://www.banffcentre.ca/departments/leadership/)), the Leadership Learning Lab at the Banff center ([www.banffcentre.ca/departments/leadership/leadership\\_lab/](http://www.banffcentre.ca/departments/leadership/leadership_lab/)), and a special issue of *Journal of Business Strategy*, v 26 (5), 2005. (23)

**Case analysis.** The best cases involve an interesting business situation in which a colorful character faces a critical decision. When possible, use cases that come with video where the main characters discuss the case. (27)

**Learning journals.** A Learning Journal is a diary that participants use to record key learnings from each session and to record plans for using that learning at work. (3)

**Reflection papers.** Participants review the material of each module and identify learning that is particularly useful for them. They also describe how they will use what they learned. (21)

**Reflection session.** Each morning, participants take a few minutes to write thoughts about yesterday's learning in their "insight book"; followed by 10 minutes of sharing around the table; followed by a plenary session for discussion. (21) In another form, learning groups meet at the end of each week to discuss their key insights. (3)

**Managerial exchange.** Participants pair up and visit each other's workplaces for a week. The guest writes a report on the experience, which is discussed with the host. The host responds to the report with one of his own. (21) Or participants write a paper reflecting on what they observed. (6)

**Organization assessment questionnaires.** Organization assessment questionnaires are used to collect data on organizational processes and leadership practices (e.g., organization culture; customer focused leadership)

to anchor learning in the real-world and/or to challenge, confirm or illustrate the application of a principle or framework. (27)

**Individual assessment tools.** There are wide variety of individual assessment tools designed to measure leadership and management capabilities and leadership and management styles. Some tools involve self-assessment and others are multi-rater. These assessments are used to help people assess their own strengths and weaknesses and to create development plans. (27)

**Personal coaching.** Personal coaching is often used with individual assessment tools, especially those involving 360° feedback. A professional coach helps the learner understand the feedback, process his or her reactions to the feedback, and make development plans.

**Team coaching.** Team coaching might be used in team-based programs to help teams with the content of their project, to help them build effective team processes and to manage team dynamics effectively. (27)

**Action learning projects.** Participants work in teams to use program content to address an issue important to the company. Action learning projects may be designed as individual or group projects. In custom programs, participants usually work in groups. These projects help participants use the program content while they learn more about their companies. Teams may share information about their projects with each other in presentations or poster sessions. In addition, team members often present their analyses to senior leaders in reports or presentations. (27)

**Study trips.** Study trips are visits to companies, countries or other sites to talk to people, and to observe and experience the place. Facilitated discussion and reflection are used to codify lessons learned. (27)

**Simulations and role plays.** Simulations and role plays are used to help participants build new skills and to provide opportunities to apply course content to simulated management problems. (27)

**Peer consulting on a personal case.** Groups of 5 to 6 participants help each other analyze and generate solutions to a personal challenge related to the course content. (3)

**Stories.** Stories are used to illustrate key concepts. Effective stories involve real people and real events, and they are set in a time and place with which participants can identify. Good stories include lessons learned. (27)

**Guided visualization.** This exercise asks participants to imagine the story they would like to tell in the future about how they lead today. (25)

**Imagining the future leadership self.** This exercise invites participants to “step into the light” of the leadership they wish for themselves and to speak from this new ‘sense of being’. They mingle and interact with one another as these future leadership selves. (25)

**50-50 rule.** The 50-50 rule calls for turning half the class time over to the participants to focus on issues on their agendas. (21)

**Five Tricks card game.** The Five Tricks exercise, also known as Bargna, is used to simulate culture shock. (27)  
[www.acadiau.ca/~dreid/games/Game\\_descriptions/Barnaga1.htm](http://www.acadiau.ca/~dreid/games/Game_descriptions/Barnaga1.htm)

**SEWA Beats drumming.** Drumming lessons can be used to teach lessons about communication and active listening; leading an activity when you are not an expert; learning a new activity; and what it feels like when things do not go as planned. (27)

**Round Robin.** The Round Robin is an exercise where participants interview each other on assigned questions. The questions can focus on an abstract concept or on a specific issue relevant to the company and the program content. (27)

**DeepDive.** The DeepDive™ is a design process combining brainstorming, prototyping and feedback loops merged into an approach that executives can use to develop solutions for specific business challenges. In some programs, participants use the DeepDive to apply program material to their own problems. Lunchtime and other selected times are reserved for DeepDive sessions. You can get more information about the Deep Dive process at [www.deloitte.com/view/en\\_US/us/Services/consulting/a02b312c66702210VgnVCM100000ba42f00aRCRD.htm](http://www.deloitte.com/view/en_US/us/Services/consulting/a02b312c66702210VgnVCM100000ba42f00aRCRD.htm) (27)

**Participant led sessions.** Participants divide into groups and choose a topic that will interest the other participants. They research the topic and present their findings. The educator's role is to guide preparation, act as timekeeper and to link the topics to the content of the program. (27)

**Participant experts.** Participants volunteer to prepare and discuss a topic on which they are experts. The number of topics may be narrowed down by voting. Each volunteer prepares a knowledge booth with posters, or makes a short presentation. (27)

**Volunteer intervention.** Each morning of the program 3 to 4 volunteers work together to provide the class with a stimulating, provocative presentation or activity that is relevant to the company and their work. (27)

**How to be a curious learner.** This exercise is designed to break down the barrier to curiosity-driven engagement, including guidelines on how people can become curious learners. (26)

**Social networking tools.** Social networking tools can be used to share the knowledge that participants bring to the classroom (7).

**Program website.** A program website can be used to share post-program experiences and discuss applications of material and learning. (3)

**Need to know groups.** Need to know groups are networks that share information and pursue some of these issues after the course is over. Need to know groups help to transfer learning to the workplace and maintain participant networks. (27)

**Goal setting.** Ask participants to set goals for using the skills and knowledge covered in the program. One study found that setting goals for the number of times they would use their training on learning styles increased retention of learning content and actual use as assessed by peer ratings. (5)

**Alumni presentations.** Alumni from previous programs return to share their experiences and insights with the newly graduating class. This session is focused on the alumni's experience when applying the program learning to their work. They share what worked for them, as well as mistakes they wished they had avoided. (29)

**Reflection session.** Participants are asked to formally reflect on their key insights from the session and/or the entire program and prepare an explicit and detailed action plan for implementing what they have learned. (27)

**Reports to coworkers.** After the program, participants share what they learned with coworkers by writing a report and/or giving a presentation. (6)

**Impact diaries.** Impact diaries are used between modules to record how participants used program learning back at work. Impact diaries might also be used after a program. (21)

**Provocation.** Use a provocative question, pose a dilemma, or present surprising data to energize participants. (27)

**Team teaching.** Team teaching can keep the energy high and the ideas flowing. (27)

**Buzz groups.** Buzz groups are short, small-group discussions used during a lecture or plenary session to let participants explore ideas in small groups and to energize the classroom. (27)

**Buzz boards.** Place white boards or bulletin boards around the room where people can post key learnings, share ideas, post questions, answers, problems and comments. (27)

**Breakout/learning groups.** Maximize diversity within the group, based on functions, talents, nationalities and personality; encourage groups to define ground rules and a few guiding principles from the beginning; avoid confusion by distributing a hard copy of assignments rather than announcing them verbally; make expectations for group output clear; typically study groups meet for 45 – 75 minutes; schedule a separate 15 minute coffee break to indicate that group time does not mean break time. (27)

**Build all possible connections among participants.** Be sure that all members of the class have an opportunity to work with every other member during the program in a small group setting. (3)

**Move people around.** Change the composition of study groups through out the program, and change the seating arrangement in the classroom as often as twice a day. (27)

**Be animated.** Use lively hands and an expressive face. Stay in good humor, laugh along with participants. (27)

**Move around the room.** According to Strebels, moving close to a speaker encourages him to be more precise with his answer or serves to shut them down. Moving back as he speaks encourages expansion of the topic and invites contributions from the rest of the class. Withdraw to the side of the room when you want an argument or discussion to continue; return to the center when you want it to end. Pacing the room creates a vibrant energy. (27)

### PART 3. SKILLS THAT FACULTY NEED TO DELIVER SUCCESSFUL EXECUTIVE EDUCATION EXPERIENCES.

In this section, I list skills (beyond expertise within a discipline) that faculty need for successful executive teaching. The order they are listed indicates

how important they are – those appearing at the top of the list are fundamental to successful executive teaching and those later on the list are more specialized skills. Some of these skills were mentioned specifically in the articles I reviewed. Others are inferred from points covered in Parts 1 and 2.

**Perspective taking:** The ability to look at the executive education experience from the learner's point of view. This skill includes:

- An understanding of the participants, including the jobs they perform and the challenges they face.
- Defining objectives from the participants point of view.
- Developing and framing key messages in a way that is relevant to the participants.
- Identifying specific learning points that have meaning to the participants.
- Anticipating how participants will react to the chosen approach. (27)

**Session scripting.** Strebel (27, chapters 1-4) describes a process for scripting an executive education session. The result is similar to a theatrical script, in that emotional tension is built and resolved several times during the session. The four acts in the executive education script focus on key questions reflecting the four phases of Bandura's social learning theory:

- Act 1. Challenge: What is the issue? Why is it important?
- Act 2. Investigate: How does it work? What should be done?
- Act 3. Construct: How can I use this? How can I build on it?
- Act 4. Change: How does this fit with my existing approach? What is similar and different to what I already do? What must I change?

Strebel also provides guidelines for structuring and managing the relationships among educators and learners in each act, and he describes how the roles that each party plays (e.g. listener, discussant, provocateur) might change across acts. In addition, Chapters 14 through 23 describe learning scripts for particular types of sessions. (27)

**The ability to facilitate conversations in the classroom.** Facilitating conversations requires three central skills: asking questions, listening to what others say, and redirecting the conversation on-the-fly. Faculty must listen, because the answers provided by participants become the fuel to drive the class, and faculty will direct the conversation based on what they hear. (27)

**The ability to develop a strong close for the session.** Closing the session on a strong note is essential. When designing the closing moments, faculty members should address these questions: Is the emotional tension that built up during the session effectively resolved? Can the participants resolve it on

their own or do they need help? Can the participants draw out the learning points on their own or do they need help? (27)

**The ability to create provocative questions and identify interesting dilemmas.** Provocative questions and interesting dilemmas can be used to generate interest in your topic. (27)

**The ability to manage study/discussion groups.** Strebel (27, Chapter 17) provides guidelines for creating and managing study groups. (27)

**The ability to facilitate action learning projects.** Strebel (27, Chapter 33) provides guidelines for selecting projects; integrating projects into a learning script; working with project sponsors; selecting project teams; selecting faculty coaches. (27)

**The ability to design an effective Analogically Situated Experience (AES).** Houde provides guidelines for analyzing the structure of an AES and designing the progression of participation. (14)

**The ability to debrief an Analogically Situated Experience and other simulations.** (14)

**The ability to coach.** Coaching can be used to personalize the educational experience for the participants to make it directly relevant to his or her work. (19)

**The ability to design and facilitate study trips.** Strebel (27, Chapter 23) provides guidelines for designing and facilitating study trips (called Discovery Expeditions).

#### PART 4. WHAT HAVE WE LEARNED?

This literature review provides valuable information about the insights, skills and tools that executive education faculty need to succeed. Twenty-one key insights, 11 skills and 45 tools and techniques were identified.

These insights, skills and tools should be included in any development program designed to help faculty build their executive education skills. Activities should be designed to help faculty acquire these insights, learn to use these tools and techniques, and build the skills they need to succeed.

An overview of various development programs that might be designed to meet these objectives is presented in *Helping Faculty Build their Executive Education Skills*, a UNICON report.

#### ABOUT THE AUTHOR

Elizabeth Weldon is an expert in leadership and management development with 20 years of experience teaching in MBA, EMBA, Executive Education and custom leadership development programs in North America, Europe and Asia. Most recently, Professor Weldon has served as Professor of Management Practice at the China Europe International Business School (CEIBS) in Shanghai, the H. Smith Richardson, Jr. Visiting Fellow at the Center for Creative Leadership (CCL), and Professor of Leadership and Management at IMD International in Lausanne, Switzerland.

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