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Spotlight On Blue & Co.'s 'Building Leaders' Program

Blue & Co. (FY10 net revenue of \$50.5 million) of Carmel, Ind., isn't run like a typical accounting firm. Instead of one MP, the 300-employee firm is governed by an elected three-member executive committee. Directors can serve, at most, two three-year terms. Although the governing body is constantly changing, succession planning remains a top priority.



While this IPA 100 firm has always placed strong emphasis on professional development through coaching and Blue University, a personalized training program, the firm wanted to do more. In December the firm wrapped up its first "Building Leaders" program, an 18-month development program specifically targeted at managers and senior managers interested in taking on director roles. The program was challenging and even uncomfortable at times, pushing the managers to make presentations, assess their own skills and take on a new project, all while continuing to do their everyday work.

"They had a lot of work to do. They were put on the spot a lot and there were probably times when they didn't like me very much, but that's OK," says **Jan Green**, Blue's Learning and Development Officer. "I didn't want them to just listen and leave," she says.

Green designed the program after talking to the executive committee about the skills they believe are important but hard to find in terms of training. Technical training is offered in many ways, so the program focused on other aspects, leadership and business development. Green says the goal was to show what behaviors are needed to be a good leader and how to "infuse leadership in the midst of the whirlwind they're in day in and day out."

The managers nominated themselves for the program by filling out applications that were examined by the executive committee, which selected 16 participants from the pool of 26 applicants. Each participant's director was given the title of "director guide," and each was assigned a marketing mentor from another office.

With the exception of a four-month break during tax season, the program was intense, including: six day-long sessions; four presentations before the executive committee or the entire director group, attendance at a partner retreat and two firmwide projects.



Jan Green

One session asked participants to “think about leadership in a way they never thought about it before.” They assessed their own skills and received 360 degree feedback. Participants then created a “plan of action,” Green says. For example, if a manager wanted to develop coaching skills, that person was tasked with creating those experiences for staff every day by talking about their strengths and celebrating successes. The executive committee led another session on Blue’s business practices; another focused on team building.

The last six months of the program involved innovative leadership. The group was split into two, and each group took on a major project. The teams had a sponsor and involved stakeholders. They met regularly with the executive committee, obtained approvals where necessary, and gathered critical feedback for project success.

One group evaluated new practice management systems and made a recommendation that was approved by the executive committee. The other team created an online tool for all staff that outlines the specific steps to career success in different practice areas.

“We wanted it to be a program that would be a value-add for the firm and a value-add for the individual,” Green says. “We [also] wanted to create an experience that would help our staff see how much they mean to us as a firm and help us retain that great talent,” she says.

The cost of \$2,500 per person was well worth the return, Green tells IPA. Consider the results. At the start of the program, participants were asked, “How often are you thinking about your leadership impact on a daily basis?” Frequently, the answer was, “not much,” with participants saying they were mainly concerned about getting their work done. After the program, leadership is very much on their minds as they go about their day-to-day routines.

“They’re saying, ‘It’s changed the way I think about myself as a leader.’ ” Green says.

As for the business development portion of the program, the changes were significant. In the 18 months of Building Leaders, the group doubled their new business compared to the previous 18-month period.

The process was overwhelmingly positive for both the firm and the individuals involved, and Green says to anyone interested in starting such a program: “Make sure you have the buy-in from the leadership at the top, and involve as many people in the program as you can, and accountability is key.”

The process took the mystery out of what is required to become a director. A few people who went through the program weren’t sure it was a role they wanted to take on, but Green says that’s valuable information too. “We’re thrilled to know what direction they’re going. It takes the guessing out of it and helps the participants step up and say what they *do* want,” she adds.

Building Leaders will likely change each time it is offered as the program is refined, Green says. One exercise, in which the participants were asked to track their marketing efforts, turned out to be time-consuming and duplicative, so it won't be back. Green says that any educational offering that didn't elicit a "wow" reaction will go away too. The next program starts in June.

"One of the greatest takeaways of this program was the peer-to-peer relationships and friendships that were formed," Green says. "These participants have been through a unique experience, and this experience has bonded them together for years to come." ■IPA



BUILDING LEADERS

BLUE'S ADVANCED LEADERSHIP PROGRAM