

**Paper: Excellent management and leadership support**

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how to get there?. October 2014 in Geneva.**

**Theme: Change Management**

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### Foreword

This paper is an continuation of the paper “*Management and TQM-system – from theory to practice. Focus: Management and leadership development and training*” presented at at the latest Workshop on HRMT, that took place in Budapest 5-7 September 2012. This paper was selected to be included in United Nations Economic Commission for Europe compilation “Human Resources Management and Training- Compilation of good practices in statistical offices”. However, the paper for the workshop in Budapest has been updated several times on requests from management teams in conjunction to international missions on this topic. The previous paper also serve as a foundation for the lectures held at Stockholm University in management system from theory to practice. The latest updated version of the previous paper could be received upon request.

The present paper is a first and rather quick version constructed by the author during September 2014. Just like the previous paper, this paper will be updated and improved on a regular basis as it serves many purposes when combined with other processes and approaches. One purpose is to serve as a foundation together with other processes, assignments and approaches for national and international missions in management systems for quality and related management and leadership competence and support.

Other stakeholders for this report are internal such as e.g.

- our Director General and his top-management team
- our managers at all levels
- co-workers at Personal Department
- our network of quality coaches
- internal and external auditors

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## 0 Summary

During 2013 Statistics Sweden launched four new and extensive management-and leadership programs, training and support to our managers. The long-term objective with this support is to achieve excellence when it comes to both management and leadership competence. The foundation for this support are the demands in Statistics Sweden´s management system for quality with EFQM as a framework. What these demands means for our leaders has been summarized briefly in our leadership profile for managers as described in our previous paper.

This paper focus on the effects of this support from five different levels in relation to the overall and specific goals for the different programs, training and support. It also describes the prerequisites for the content and how it has been tailor-made from the above demands and other frameworks for excellence highly related to transform excellent leadership successfully into practice.

Our first evaluations of the programs, training and support has been done according to the five levels presented below (The LISTA-model):

1. Reactions. What did our managers like about our programs, training and support?
2. Learning/Insights. What did our managers learn? What new insights did they get? What new talents and strengths did they acquire?
3. Applications. How have our managers applied the learning and insights from the different programs, training and support?
4. Results. What are the short and long-term results from different perspectives?
5. Return-on-Investment (ROI). What are the cost-benefit ratio? Is it possible to measure ROI-effects in a reliable and relevant way?

Statistics Sweden´s findings from this evaluation shows that the outcomes are very satisfying according to the five levels above. Furthermore, the results underline how important it is for an organization to work strategically with HR-issues in order to transform a management system for quality successfully into practice. Continuous and never-ending improvement in any area is always a moving target especially since the most crucial success factors are leaders, co-workers and culture.

Four issues are especially important in order to improve and accelerate our future journey towards excellence. First, our top-management team still has some work to do e.g. when it comes to clarify the change within the organization. Second, more approaches, methods and data are necessary in order to measure the long-term effects of our management support according to level four above. This also applies to the cost-benefit ratio as mentioned in level five above, although some ROI-examples are presented in the paper. Third, our existing managers need to prioritize competence development even further. Fourth, our managers need further support from the HR-department.

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## 1 Introduction

### 1.1 Background

On behalf of Statistics Sweden's Director General, a strategic project team<sup>1</sup> was formed in 2007 to recommend an excellent management system for business excellence for our organization. The project team delivered a report that suggested such a management system and action plans for its implementation. Since our Director General's decision 2008 EFQM, Six Sigma/Lean Six Sigma and Brink's Modern Auditing forms the basis for Statistics Sweden's work towards excellence.

During 2013 Statistics Sweden launched four new and extensive management-and leadership programs, training and support to our managers. The long-term objective with this support is to achieve excellence when it comes to both management and leadership competence. The foundation for this support are the demands in Statistics Sweden's management system for quality with EFQM as a framework. What these demands means for our leaders has been summarized briefly in our leadership profile for managers as described in our previous paper.

Statistics Sweden's management-and leadership programs, training and support to our managers has been tailor-made from the demands in our management system, but also from other frameworks for excellence highly related to transform excellent leadership successfully into practice, see chapter 3.

From 2013 and onwards Statistics Sweden's management and leadership development, training and support are:

- Management and leadership program for aspiring managers. This program is 20 days in total. Besides a new content the demands and requirements has been raised significantly before, during and after the different educations with a focus on "learning by doing" - active learning techniques from cognitive psychology.
- Management and leadership program for new managers. This program is 20 days in total and is tailor- made for new managers at Statistics Sweden. Besides a new content the demands and requirements has been raised significantly before, during and after the different educations - active learning techniques from cognitive psychology.
- Management and leadership programs for managers. These programs are offered continuously from march 2013 on demands. These contains many educations, trainings from the above programs complemented with advanced and postgraduate levels. It also includes professional executive business and leadership coaching, group- and team coaching and other support.
- Management and leadership programs for department managers with a focus on coaching leadership. This program is for 10 days in total.

An extensive movie- and e-learning material has also been developed and launched, see 4.1.1.

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<sup>1</sup> Martin Lagerström, Prof. Lars Lyberg et al.

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## 1.2 Purpose and objective

This paper focus on the effects of this management support from five different levels in relation to the overall and specific goals for the different programs, training and support.

The reader will also get information regarding the prerequisites for the selection of the content for our support and how it has been tailor-made from the above demands and other frameworks for excellence highly related to transform excellent management and especially leadership successfully into practice.

The evaluation in this paper focus mainly on

- Management and leadership program for aspiring managers,
- Management and leadership program for new managers.
- Management and leadership programs for manager where data or enough data is available to give a first estimate and/or evaluation.

That means that our management and leadership program for department managers is excluded in this paper. According to the participating department managers they were very satisfied with this leadership program.

*Quality in a service or product is not what you put into it. It is what the client or customer gets out of it.” Peter Drucker*

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## 2 Management system

In theory (as e.g. EFQM model) and even more so in practice the most crucial success factors towards a culture of continuous and never-ending improvement are management, leadership, co-workers and culture. The most important players to make this happen are the managers in the organization. You change the culture (how people think, feel and act) in an organization by changing the behaviour of its leaders. Therefore this section will focus on the Leadership box in the EFQM framework.

All organizations strives towards being successful in some way. A lot of organization fails, some organization´s achieves success during periods, but very few organization´s achieves sustainable success during long time periods.

*“An organization´s definition of success will differ significantly from another organization´s definition. Failure, however, is always defined in the same way. Failure is an organization´s inability to use its core process to reach its goals for its stakeholders, co-workers, business or whatever the goals may be”* Unknown

Experiencies shows that there are many organizations that tries to transform their businesses with the help of a management system for excellence. A few of them succeed. Many organization´s fails. Being successful can only be defined in one way, namely to achieve good measurable and sustainable results for the organization's various stakeholders. In other words, to achieve good outcomes to our customers and users, managers, employees and other stakeholders.

The common factor for the few organization´s that achieves such long-term success is that they work goal-oriented and strategically with both management and leadership. Research and experiencies also illustrates how rare such a phenomenon really is in practice.

Recognized Excellence frameworks for business development such as e.g. EFQM, SIQ, etc., all provide general information when it comes to sustainable successful business development for different parts of the organization. The frameworks also provide general quidelines to what areas that are most important to develop and why it is important.

In short, excellent management systems for business excellence should be a blend of the following three components in order to transform theory to practice:

1. Framework for business excellence that encompasses the whole organization such as e.g. the EFQM Excellence Model
2. Working processes, methods and tools for continuous improvement necessary in going from words to action. Some samples, Six Sigma, Lean and other excellent approaches e.g. goal-based management, personal-, leadership, group and team development, business and leadership coaching etc.
3. Monitoring and evaluation as e.g. Brink´s Modern Auditing, the RADAR-framework in EFQM etc.

## 2.1 The EFQM Excellence Model

### 2.1.1 What is the EFQM Excellence Model

A short presentation of the EFQM framework is given here for the reader who is not familiar with the framework. EFQM was created in September 1988 by several directors of some prominent European organisations. The initial impetus for forming EFQM was a response to the work of W. Edwards Demings and his work. It now includes over 700 organisations with over 30 000 employees in most countries and industries in Europe. EFQM is a foundation whose members consist of companies that are interested in quality and business development as well as various methods for improvement. EFQM has instituted an annual European label ("the EFQM Excellence Award"). The main activity is the development and management of the EFQM framework, through which companies and organisations can evaluate and more important improve themselves.

The EFQM model is e.g. recommended by Eurostat to be used in the statistical offices together with other approaches such as Code-of- Practice etc. The EFQM-model consists of nine enablers and four results

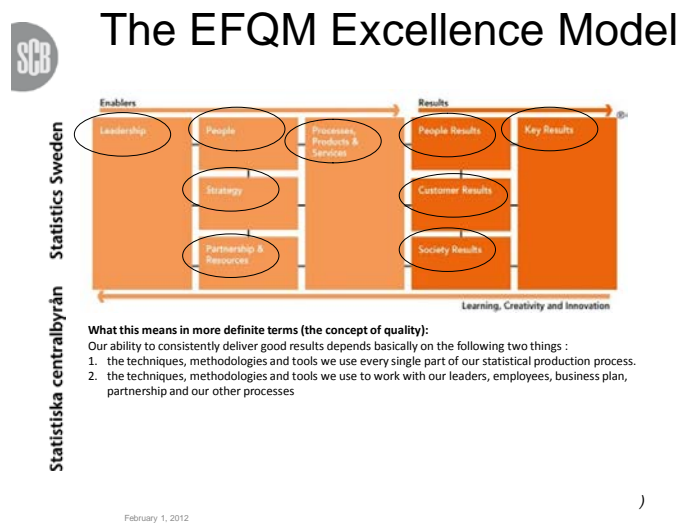


Figure EFQM. On the left side of the EFQM model are the "Enablers" (Leadership, People, Operational Planning/Strategy, Partnership and Processes). The value or results for the right side of the model, "Results" (People Results, Customer Results, Society Results and Key Results) depend on how well the "Enablers perform their tasks.

"Excellence" is, according to the EFQM defined as successful approaches that lead to good results. That means that an organization should strive to achieve excellence in everything it does and with respect to all approaches e.g. how it work with its customers and users, leaders, co-workers, strategy, products and services etc.

The EFQM Excellence model is a holistic framework for excellent business development for *the whole organization*. In short that means that all other activities within the organization are different pieces within that whole, see 2.1.4.



### 2.1.2 Who can use the EFQM Excellence Model

The EFQM-model is suited to all types of businesses, regardless of sector or size. A statistical agency could use it in many different ways see 2.1.4.

### 2.1.3 Why use the EFQM Excellence Model

Before adopting any model, framework and/or management and leadership approaches etc. an organization should always ask itself “*how do you know that it works*”. One example of an extensive (five years) scientific study gives solid answers to that question. This study includes over 600 quality award winners against a control group similar in size and business. The difference between these two groups are huge when it comes to average change in many performance measures such as leadership, efficiency, co-workers, key-performance business results etc. Besides that people perform and feel better in these organization’s similar studies strongly indicates that effective application of these excellence principles also do make good economic sense. Besides the studies mentioned above the author has own experience in using the EFQM-model as a manager together with different management and leadership approaches needed to apply a goal-oriented, proven and complete management process. The management process was highly needed to transform the total quality management system within environment statistics (The SMED consortium) successfully to practice. The SMED-consortium involves four different but collaborating organizations. The model was mainly used as a strategic guidance when it comes to what approaches to use and how to use them in order to improve the outcomes for different stakeholders. The achieved outcomes for customers, users, co-workers, top-management and other stakeholders consist of ten years data, and has been verified many times by national and international revisions and peer-reviews. For example of results, see my previous paper.

### 2.1.4 How an organization can use the EFQM Excellence Model

An organization can e.g. use the EFQM- model in a number of ways such as e.g.

- Understand the culture, principles and values that often lead to success in any organisation.
- As a structure for the organization’s management system and its work with its operational plan and related strategies and continuous and never ending improvements regarding its core process
- As a tool for Self-Assessment by measuring where the organization are on the path to excellence and identify gaps and the most important improvement areas
- As a basis for communication (a common vocabulary and definitions) and ways of thinking about a more holistic business development that encompasses the whole organization instead of separate parts.
- As a guidance in how to transform theory to practice with good results such as e.g. what approaches to use and how to use them in order to develop a strategic support for top-management, managers and co-workers.
- Apply for quality awards. Important to highlight that *it is not* the scores, awards etc. that it is important in the long run. The focus should always be application of working processes that increase the results and value for the organization’s different stakeholders.

### 2.1.5 How different stakeholders can use the EFQM Excellence Model

Besides the usage described above top-management could use the EFQM Excellence Model to develop and execute a more strategic management support, training and leadership program such as we have done e.g. in Sweden. This support should include evidence-based approaches when it comes to developing both management and leadership competence. Top management could also use the model as a basis for a more strategic communication to different stakeholders. One example could e.g. be to communicate the relationships between its visions, mission statements, strategic, short term goals, values etc. in its operational plan and different ongoing activities, projects etc. within the organization, department and/or unit.

Individual managers could e.g. use the model together with other approaches as a guidance to develop more challenging visions and to decompose these visions into long and short term goals for themselves, their unit or department. Goals that steers and inspires managers and co-workers to action and to further improve the services and products for different stakeholders. Managers could also use the model as a guidance to develop their own competence in a more strategic way such as what approaches to learn, when and how to apply them to improve their daily operation. Managers could also use it as a strategic guidance when it comes to what and how to develop a mindset and a culture of constant and never ending improvement.

Co-workers, group and team leaders could e.g. use the model in conversation appraisals with their managers to identify key areas in order to become better leaders and to contribute more to their organization in all aspects. The bull's eye for an organization should always be to develop as much leaders as possible instead of titles etc. Co-workers, group and team leaders could also use the model to increase insight and awareness of the underlying principles, values etc. for business success and its relationship to their future development.

These are just some examples of different usages. However, in order for an organization to achieve good outcomes the EFQM model must be transformed into practice by e.g. adopting excellent and practical approaches for all areas. That's much easier said than done. That's where the big challenge resides. The transition from what to how and later great results is far from a quick-fix, and is more like chopping down a tree with an axe rather than cutting it down with a chainsaw once and for all. A successful transformation requires both breadth, depth and practical usability of chosen approaches. It also requires a long term commitment.

*“Small daily learning and doing – over time – leads to a tsunami of excellent results”*

### 3 Method for developing the content

Recognized Excellence frameworks for business development such as e.g. EFQM, SIQ, etc., all provide general information when it comes to successful businesses for different parts of the organization. The frameworks also provide general guidelines to why it is important. Unfortunately the emphasis is very much on general when it comes to most models, modalities or frameworks for Excellence. It requires a whole lot of in-depth analysis in order to start the journey towards excellence. The first step in this journey concerns what to do and why. Subsequent steps are about how to do it. Then it is all about to be persistent enough during the journey when executing the strategy. Excellent results will follow, but it takes time as many temporary setbacks will appear during the journey.

#### 3.1.1 How has the content been developed?

The content for our management support has been tailor-made from the demands in our management system for Excellence and other frameworks for Excellence, Peak Performance and Wellness that is highly related to transform excellent leadership successfully into practice.

*“Always begin with the end in mind” Stephen R. Covey*

The author used the following questions for developing our support to our managers

- What characterizes excellent organizations? What does this mean in more definite terms? How do I know that?
- What are the differences between excellent management and excellent leadership ?
- What characterizes managers in excellent organizations?
- What characterizes leaders in excellent organizations?
- What competencies, traits and behaviours are important?
- Which competencies, traits and behaviours do we have?
- Which competencies, traits and behaviours do we need?
- Which are most important?
- What kind of evidence-based approaches exists? How adoptable are they to our organization?
- How do our managers learn to apply them successfully in their daily operation (and life)? How do our managers develop knowledge into great abilities?

The above questions together with my own experiences both as a management consultant and manager and the needs, demands and expectations from managers both within and without our organization have been used.

However, for an organization to be able to respond to the questions above in more detail requires in-depth competence of several different modalities for Excellence. In particular, if an organization is interested in transforming theory to practice with good results.

In short, an organization need to know what kind of approaches to include, how to include them and why some approaches leads to results and others don't.

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Let us consider one of the criteria in more detail, namely EFQM's definition or mission statement for leadership.

The definition or mission statement for Leadership is:

*"Excellent leaders develop and facilitate the realization of the organisation's vision, mission statement, targets, business idea and values. They develop the values and the systems needed for long-term success and implement these through appropriate measures and their own behaviour. During periods of change they look to maintain the long-term direction that has been laid down. If required, these leaders also have the ability to change the direction and inspire others to follow. "*

To operationalise a mission statement of this kind requires specifications. The EFQM model leadership criterion is therefore divided into the following five sub criteria (only first level is shown below) to support an organisations further work towards Excellence:

- a) How leaders develop a mission statement, vision, values, and ethics, and are role models of a culture that strives towards excellence.
- b) How leaders are personally involved in ensuring that the organisation's management and TQM-system is developed and continuously improved.
- c) How leaders interact with customers, partners and community representatives.
- d) How leaders create and reinforce a culture of business development among the organisation's employees.
- e) How leaders identify areas of improvement and support improvement work.

### **3.1.2 What does the criteria mean?**

So what does the above definitions and criteria with related sub-criteria really mean? You get a general guidance to what is important for successful leadership according to the questions above. With an emphasis on overall. Frameworks for Excellence as e.g. EFQM give general guidance, but notice the word **How** for every criteria and sub-criteria in the EFQM-model. You like me are maybe aware of the big difference between what and how and its connections to results achieved in practice.

In other words, the different frameworks for excellence mostly only provide general answers to what to focus on, but not in terms of what kind of approaches to use, and especially not how to use them. There is a big difference between what and how. A crucial difference that those who are interested in achieving excellent outcomes in practice must be willing to overbridge.

For example, if we take the criterion of *"Leaders develop mission, vision, values and ethics, and act as role models themselves"* one needs to know which approaches, competencies, characteristics, etc. that are important and that works for developing visions, values, etc. You also need to know how to use these approaches, skills, qualities, etc., so that the vision, value, etc. leads, steers and motivates managers and employees to perform and feel well and achieve great results. This reasoning applies to all definitions, criteria and sub-criteria in the whole EFQM-

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model and other similar frameworks for Business Excellence. The guidance in most Excellence frameworks lacks both breadth and especially depth concerning practical issues. That issue is left for each organization and/or manager to answer.

### 3.1.3 What is required to transform theory to practice?

Making good decisions about approaches is a crucial skill in order to transform frameworks for excellence successfully to practice. For example, top-management need to answer several questions. The starting question should always be *“What would we need to know before making any decisions about what management and leadership support to include, and how to include it?”*

*“In strategy it is important to see distant things as if they were close and to take a distanced view of close things”* Miyamoto Musashi

For an organization to move from words to actions so that their managers exercise the same kind of leadership that successful leaders exercise requires four issues to begin with:

1. an organization needs to specify what it want to achieve with the leadership in much more concrete terms than these rather fuzzy definitions, criteria, sub-criteria etc. in different frameworks stipulates.
2. an organization need to be aware of what kind of approaches, competencies and characteristics that exists and leads to great results
3. an organization should know which approaches, skills, qualities, etc. that is most important to start with to achieve this.
4. an organization must develop their support to their managers in accordance with both what they should learn and how they should learn to apply them successfully in order to develop abilities in both management and leadership. Knowledge or skills alone is not enough. Abilities is.

*“ Knowledge without application brings no profit”* Unknown

To summarize. For an organization to be able to answer the questions above and start putting theory into practice, *it need to know what it want to achieve in very definite terms, why it need to achieve it, what it need to do, how it should do it, who is responsible for doing it, and what the long-term benefits are for different stakeholders compared to other decision alternatives or doing nothing.* Research and practical experiences clearly shows that the benefits exceeds the costs in the long term for the few organization´s that are persistent, see 2.1.3. It also illustrates how important a long-term commitment is by top-management and line managers at all levels. That commitment includes, among other things, to get a more in-depth insight about the organization´s management system, its relationship to their responsibilities as managers and what it means in more practical terms.

If you unfold the essence behind the words in the above paragraph you will, among other things, find that it requires a vast amount skills highly related to both management och leadership. Words, concepts etc. are, as you know, only pointers to the real essence – they are never ever the essence itself. Each single word in the above paragraph points to something much deeper, namely the principles behind the words. That´s a huge difference. These principles should be scientifically derived.

It also means that everything must be very definite e.g. when it comes to what it want to achieve. An organization must be able to answer the question *“How do we*

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*know if and how we have succeeded or not?"* What it want to achieve must be very definite. It must be followed by definite plans and appropriate actions for the attainment of what it desire. It got to have a definite purpose. It got to have plan. And it has to start to put that plan into action persistently and step by step. It has to give a support to its managers. Only then results will follow. Success is here defined as an organization's results for its stakeholders and not acquired educations, certifications etc. The latter could be important means to get results if – and only if- they are integrated successfully into the daily operation and generates value for the stakeholders.

Besides knowing about frameworks for successful business development, it is a great advantage to know other approaches from other fields of excellence, wellness and peak-performance, i.e. for those who want to transform what to how successfully.

There are many such frameworks and proven approaches within excellence, wellness and peak-performance that are highly connected to successful business and leadership development especially when it comes to skills and abilities. Some examples are personal-, leadership-, group- and team development with mental training, personal achievement, change management, decision-making etc.

Which approaches to pay attention to and which to ignore when developing a long-term and strategic management and leadership support are very important. Examples of important and relevant such decision-making questions are:

- What do you need to know before jumping to conclusions or decisions about anything?
- How do you know which approaches that are suitable or not?
- How do you know that you make good decisions when it comes to which approaches to include or not?
- How do you follow-up your decisions and improve your decision making regarding selected approaches?

The above questions are not easy to answer. It requires excellent processes in decision management. Needless to say our decision making abilities are not very impressive. That is also a scientific fact (Kahneman et al). In order to counteract the worst pitfalls in our decision making we should keep "a close watch on our thinker". Watching the thinker means that we need to specify our decision-making process. We need to clearly describe the basis for which approaches we include or not. A clear description is also necessary for evaluating and improving the approaches. In other words, you need explicit guidelines or criteria for your decision-making process.

*"Be willing to make decisions. That's the most important quality in a good leader "*  
General George S. Patton.

### 3.1.4 How to select approaches - five guidelines

The authors overall principle for selecting approaches to our management and leadership support are evidence-based approaches and/or recognized principles from decision management or operation research. The other three guidelines mentioned below are also important, and constitutes an addition to formal decision management approaches. They are all about how to put these principles into practice successfully from different perspectives. Experience shows that there is often a large gap between theory and practice or between words, actions and results.

- Recognized Principles (Principles in the Game)
- Evidence-based (Science in the Game)
- Experience (Skin in the Game)
- Experiential (Soul in the Game)
- Time-based (Time in the Game)

This report will only describe the above criteria very briefly. Later version will describe it in much more detail and their importance for decision-making. The above principles is also highly related to the EFQM-RADAR assessment framework in our management system as presented in section 3.1.6.

*“Decide WHAT you want to achieve, WHY you want to achieve it, WHEN your want to achieve it, HOW you will achieve it, WHAT resources you need to achieve it, WHO you need to become to achieve it, and HOW you know you have succeeded and WHICH stakeholders who will benefit from the outcomes except from yourself”*  
Unknown

### 3.1.5 Recognized principles (Principles in the Game)

The first two criteria are closely related. Good principles are often derived from scientific research. Good principles, namely ideas, hypotheses, theorems or theories who repeatedly receives scientific support and that has proved to be possible to apply successfully in a variety of areas. Principles are therefore related to the time-based criteria above, as it e.g. requires repeated scientific studies to be regarded as a sound principle.

### 3.1.6 Evidence-based approaches (Science in the Game)

Evidence-based approaches is working processes, methods and tools that has been tested according to scientific principles. You can rely much more on such approaches when it comes to results compared to non-evidence-based approaches. There are many important things that distinguishes these two approaches from each other. That scientific studies have been conducted implies that you can be more certain about the soundness of the approaches, but you should also be aware of common pitfalls when organizations claims that its approaches are evidence-based. When companies states that their approaches are evidence-based or relies on scientific studies that could actually mean many things. Common pitfalls to be aware of are e.g. that approaches that claims to be evidence-based that in fact are based on faulty designs or other incorrect applications of sound scientific principles. Some, but far from all, important issues that distinguish scientific studies from pseudo scientific studies are mentioned below.

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First, evidence-based approaches rests on an underlying theory. A theory that has been tested empirically in order to study if evidence are conclusive that the theory holds in practice or not. Second, evidence-based approaches are based on empirical tests that have been conducted in a systematic, controlled, empirical way. (Pseudoscience involves selectively choose what suits one's theories in retrospect). Third, evidence-based approaches should have been performed in such a way so that, on reasonable grounds, alternative explanations can be excluded when it comes to what causes a certain effect. Fourth, the relationship between cause and effect has been conducted with objective methods and in such a way that it can be checked by other researchers (peer-reviews) such as publication in research journals or similar. Fifth, evidence-based approaches should only test issues that could be tested empirically and clearly describe the issues that were excluded to the tests.

### **3.1.7 Experience-based (Skin in the Game)**

Experience-based is about the extent to which the principles have been used in the real world, or if it's just "laboratory work", loose theories and concepts with little personal experiences or practical applicability. Evidence-based gives more reliable basis for what probably works and why. Experience is about the experience gained in the transition from what to how. For example, you can select a solid evidence-based approach, but apply it wrongly. Numerous examples of this could e.g. be found in research literature e.g. when it comes to misapplications of different psychological instruments and/or recruitment tests (Ekehammar et al.).

### **3.1.8 Experiential-based (Soul in the Game)**

Experiential is about the results that have been achieved through the practical application. This concerns the transition from what, how and to achieved outcomes. What results has been achieved? Have the trainers the organization use invested time and money themselves to apply the principles in different areas with good results or not? That is related to other management and leadership skills such as goal-based management, cost/benefit skills etc. It is very important that you are very definite about what you are going after. You got to have definite purpose. It should by no means be anything vague or fuzzy about it. It pays to take time to do that very thoroughly before jumping to how. That means among other things that you should make both the tangible and intangible aspects of your goals measurable. However, that is unfortunately very rare in both private and public organizations according to both research and experiences. *What can be measured can be managed, and what gets managed gets done* is an old saying. The author share Douglas Hubbard's opinion (one of the leading experts in Applied Information Economics) in that both the tangible and intangible aspects could be measured with high quality as mentioned in 6.2.5.

*"Measure what is measurable, and make measurable what is not so"* Galileo Galilei

### **3.1.9 Time-based (Time in the Game)**

Time-based concerns principles validity over time. How long have the principles proven to be effective? Have they passed "the brutal tests of time" is a very good indicator if it applies in any subject domain. Old solid principles, books etc. are



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often superior to newer ones both from a mathematical perspective, scientifically and practically. That should be obvious because they have survived the test of time. I refer to Nassim Taleb's book Black Swan if you want to see the mathematical soundness of time-based principles. Another aspect of this principle has to do with the time aspect for transferring knowledge to skills, and later to good abilities through applications, practices and systematic training. That requires time, and could most often not be accomplished in a short time period or with a quick-fix mentality.

### **3.1.10 How our approaches meet the criteria**

Our management system for business excellence with EFQM as a framework was formed to identify, recognize and promote sustained success and provide guidance to those who strive to achieve it. The approaches that are included in our management and leadership support builds on the criteria and sub-criteria in the EFQM-model, and most are evidence-based and/or are quality assured by other means. They also meet the other criteria mentioned above with respect to experience, experiential and time-based.

Some examples of approaches that meet the criteria in our support are goal-based management, change management, mental training, psychological tests, business-, management and leadership coaching.

### **3.1.11 Goal-based management with principles from mental training**

The goal-based management approaches and business and leadership coaching programs included in our support are based on the principles from mental training and how to put them into practice successfully. These principles are executed fully to practice within the more extensive business and leadership programs in our support.

Mental training has extensive research support from several different subject domains. In fact, mental training principles for individual, leadership, group and team development and its related Integrated Mental Training Programs (IMT) has over 50 years of scientific and practical studies to back up its effectiveness in elite-sports, leadership, personal growth, schools etc (Uneståhl et al). IMT is defined as a systematic, long-term and evaluated training of mental processes (Thoughts, Images, Emotions, Concentration, FLOW, Self-Image, Mental toughness, Positive Mental Attitude, Goal Programming, Life Quality, Creativity etc). IMT is long-term in the sense that the training programs are used between 3 and 7 months, after which the cognitive, emotional and behavioral changes are so integrated that the effects are stable and often lifelong. IMT is systematic, starting with the basics (muscular and mental relaxation) followed by specific interventions and applications and a more personal and tailor-made development system.

IMT is scientifically evaluated from two different aspects. One part of IMT was constructed by an analysis of more than 30 methods for personal development and growth. The analysis was made in order to take away the unnecessary and mystical parts, find the effective components and use them in IMT. Another part came from analysis of successful people (in sport, business and leadership and other areas) in

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order to find the mental reasons for their success. Continuous evaluations of the IMT-programs have been made to make it possible to modify and develop them and in order to be ensure sure that they give the expected effects.

### **3.1.12 Psychological approaches**

The psychological leadership, group-, team and co-worker approaches that are included in our support have over 40 to 50 years of scientific studies to back up its reliability, validity and usability. However, some weaknesses has been identified by some researchers when it comes to some individual psychological tools according to the peer-review criteria. However, the many case-studies we have within our organization clearly shows that these tools meet the practical criteria in 3.1.3.

### **3.1.13 Change management**

When it comes to our approaches regarding change management the research data covers approximately 3 000 organizations from 65 countries, with 6 studies over the last 12 years. This is impressive compared to other approaches that exists on the market regarding change management.

Experiencies also illustrates that the criteria skin-, soul and time in the game applies for these approaches.

### **3.1.14 Business and leadership coaching**

The selected and certified business and leadership coaches are quality assured by ICC/ICF and EMCC European Quality Award (EMCC EQA). Both the three days education in a coaching leadership style (which is not the same as business and leadership coaching programs) and the more extensive and tailor-made business and leadership programs are conducted by these coaches.

Furthermore, these coaches are certified as ABLC business, management and leadership coaches. To be certified as a ABLC business, management and leadership coach requires six months training, and is one of the few business and leadership coaching trainings in the world that are quality assured by the EMCC EQA (Europe's leading quality institutions) on a practioner level. That was received after 18 months of evaluation. This quality assurance is important for an organization as it gives a profound quality check that the selected approaches meets high and agreed upon standards regarding professional business and leadership coaching. They are also benchmarked against best practices. In other words our selected coaches have practical and professional experiencies with a minimum of 250 hours documented, logged and approved training. The selected coaches in our support is way above and beyond this standard as they have over 10 years of professional experience with business, sports-, and leadership coaching. This is among the highest possible level in the world.

Furthermore, all selected business and leadership coaches are also certified and licensied mental trainers. The training for the certification and license is the most qualified and comprehensive training in the world in the field of mental training. To become a certified and licensied mental coach, the user must complete 4 000 hours of approved studies, exercises, tests and training. A certification as an international

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certified coach is also a requirement for being a master mental trainer. Besides certified business and leadership coaches all our coaches also fulfill these requirements.

The individual tailor-made business and leadership coaching programs to our managers and management teams are based on a combination of business and leadership coaching, mental training and psychological approaches for personal-, group and team development. The Integrated Mental Training processes (IMT) are sometimes combined and integrated with the business and leadership coaching programs, i.e. for the managers who want a very ambitious personal-, leadership, group- and team development.

Research and our own experiences so far clearly illustrates the effectiveness of business and leadership coaching programs when it comes to ROI-effects on all levels, see chapter 6 for some examples. However, the reliability and validity of ROI-calculations within the coaching industry could and must be improved even further.

### **3.1.15 Personal efficiency with Lean**

When it comes to our courses, training and programs in personal efficiency for individuals, managers, groups and teams they are based on the principles from Lean. It exists many definitions of Lean, and many different applications of it. Unfortunately there are many misapplications of Lean too. The two most common goals for adopting Lean for municipality and agencies is increased productivity and increased efficiency. That is only small parts of Lean and does not cover the original principles behind it. The kind of Lean approach adopted from Toyota and its Toyota Production System (TPS) is the foundation when it comes to Lean. In order to apply that kind of system an organization must learn the principles behind it, and above all how to apply them. That is no quick-fix. The original Lean-system is grounded on 14 principles for continuous improvement. These 14 principles are organized in the four broader sections mentioned below:

1. *long-term philosophy*. In short that means managing and making decisions with a long-view rather than for short-term gain. It reflects a belief that managers and people need purpose to find motivation and establish goals. A field within statistics called operation research or decision management clearly shows the evidence or soundness behind this long-term decision principle from a mathematical perspective. Goal programming with mental training illustrates the evidence behind goalprinciples such as how to develop goals that motivate to action and results.
2. *the right process will produce the right results*. Behind this section is the next seven principles that focus on stakeholder-based processes with quality outcome as a yardstick. Stakeholders first. Processes later. Following these principles approaches and processes should always start with the stakeholders needs, demands and expectations in mind, and processes should then be redesigned to eliminate waste in the work flow (overproduction, defects etc) e.g. with tools like 5S, value-flow analysis etc. Pure logic illustrates the soundness of this kind of thinking. A common

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problem is to apply small pieces from Lean wrongly, and from process to stakeholders instead of the other way around.

3. *add value to the organization by generating value to your customer and developing people*. Human development is the focus of principles 9 through 11. In sum they have to do with developing leaders, co-workers and groups into high performing teams. A successful transformation of a management system for quality from theory to practice consists by human development in all aspects. Many research studies clearly shows that there are a strong relationship between human development and results for different stakeholders. The few organizations that undertake such a long-term commitment in developing their managers and co-workers will be richly rewarded. Unfortunately, these studies also indicates how rare it is in many organizations. One example concerns change management (see 6.4.3).
4. *continuously solving root problems drives organizational learning*. The final principles embrace a philosophy of problem solving that emphasizes thorough understanding, solutions-based solutions, execution, learning and improvement. This general principle also relates to management and leadership. Research identifies between five to ten common mistakes that managers frequently do regarding this. Our support includes evidence-based approaches that will reduce or eliminate these mistakes if our managers develop abilities to apply them well in their daily operation.

Six Sigma and related approaches within quality management that were developed in the western world as a response to the proven effectiveness of this Lean-system are rather similar in nature to Lean in most aspects.

Very few (none is probably more correct) organizations in the public sector launch that kind of extensive and holistic Lean-programs as e.g. Toyota's, i.e. that covers the whole organization. That requires a very high ambitious level from top management. It is much more common that organization's apply small and different pieces from the whole philosophy as e.g. value-flow analysis, 5S and waste-analysis. These pieces are also included in our support for managers, but we have the intention to go further as stated in the tailor-made and long term programs we offer to our managers in personal efficiency with Lean.

Besides Womack's research in "The Machine that Changed the World" the research on the effectiveness on Lean in the public sector is not as extensive and evidence-based as the other approaches included in our support. It is important to notice that many of the underlying principles are evidence-based. One research problem is that it does not exist one common definition of the Lean-concept. Another is that the research lacks underlying theory, experimental good designs, empirical data with statistical analysis etc. Finally, a major one is that it lacks controlled experimental studies on its long-term effects regarding the cost benefit relations on important stakeholders as e.g. customers and co-workers (Mikael Brännmark, Official Reports of the Swedish Government, October 2012).

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### 3.1.16 Our principles for training

Besides a new content the demands and requirements has been raised significantly before, during and after the different educations - active learning techniques from cognitive psychology. The principles for training is related to the practical criteria mentioned above - Skin in the Game, Soul in the Game and Time in the Game.

The theoretical framework for how we carry out our management and leadership training is a mixture of the Adult Learning Theory, Kolb's experiential learning and different techniques from cognitive psychology and elite sports as e.g. the development and training model. The intention with this mixture is to increase the speed of the transition from knowledge to skills and later abilities through applications, practices and systematic training - "*practice makes perfect*".

That means that our managers in the future should be able to give definite answers to e.g. internal and external auditors e.g. from EFQM, SIQ or others when it comes to what management and leadership approaches they use, how they use them and what specific outcomes (cost/benefit-terms) these approaches generates for their external and internal stakeholders as e.g. user, customers, employees etc.

The MACIS-principles is a supporting principle for carrying out our training

- Motivation, i.e. increase the participants will to learn, and then actually learn.
- Activity on participants not just at the trainer, educator etc.
- Concretions. Use concretion and integration of approaches to reality
- Individualize. Individualize the training as far as possible according to different participants needs
- Synergy. Include teamwork and collaboration when learning approaches means shared commitment, responsibility and it is also much more fun.

The relationship between the principles mentioned in 3.1.4 to 3.1.16 and the RADAR-framework in EFQM is strong.

### 3.1.17 RADAR

The RADAR framework or logic in the EFQM-model is a dynamic assessment framework and powerful management tool that provides a more structured approach to questioning the performance of an organisation. At the highest level, RADAR logic states that an organisation needs to:

- Determine the results it aims to achieve as part of its strategy. What do we want to achieve, and why? Always remember that what to achieve always comes before how to achieve it. Never ever the other way around.
- Plan and develop an integrated set of sound approaches to deliver the required results both now and in the future. How do we achieve this?
- Deploy the approaches throughout the whole organization in a systematic way to ensure that they are implemented everywhere. How / Where / When are they implemented?
- Assess and Refine the deployed approached based on monitoring and analysis of the results achieved and ongoing learning activities. How do we measure whether it is working?

- What have we learned and what could be done differently in order to improve them ?

RADAR is a simple but powerful management tool that can be applied in different ways to help drive continuous improvement:

- Assessing the maturity of the approaches you have implemented
- Assessing the excellence of the results achieved
- Helping to structure improvement projects

To help support robust analysis, the RADAR elements can be broken down into a series of attributes which contain guidance on what EFQM-experts expects the organisation to demonstrate during evaluations.

**RADAR for Approaches**

Approaches	Explanation
Wellgrounded	The approaches have a clear logic, based on relevant stakeholders' needs and are based on processes
Integrated	The approaches support the strategy and linked to other relevant approaches
<b>Deployment</b>	<b>Explanation</b>
Implemented	The approaches are implemented in relevant areas and at appropriate times
Structured/ Systematic	The performance is structured and allows for flexibility and organizational adaptability
<b>Assessment Refinement</b>	<b>Explanation</b>
Measurements	The efficiency, effectiveness and application of the approaches are measured in an appropriate manner
Learning & Creativity	Learning and creativity used to create the opportunities for improvement or innovation
Improvement & Innovations	The results of measurements, learning and creativity are used to evaluate, prioritize and implement improvements and innovations

When assessing **Enablers**, an organization should look at the approaches adopted, how they have been deployed and how the organisation assesses and refines their efficiency & effectiveness over time. In practical terms, this means an organization should look for:

- Sound and integrated approaches that support the achievement of the organisation's strategy
- Structured deployment within all relevant areas of the organisation that enables refinements to be implemented within appropriate timescales

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- Measurement being carried out so the organisation can understand how well the approach is working and how effectively it has been implemented
- Learning activities being undertaken to identify alternative or new ways of working
- Improvements being implemented as a result of measurement and learning (closing the loop)

**3.1.18 What about our approaches and RADAR?**

In short when studying the above criteria for enablers we instantly notice that we have a very solid and evidence-based foundation when it comes to selected approaches in our management support by our selection criteria as described in 3.1.3. In other words they are more than well-grounded and integrated according to the definitions in RADAR. The approaches are implemented in relevant areas in our organization. However, it is important to mention that they are not yet implemented in the whole organization. We still have a lot of work to do to assure that all management teams, managers, group- and teamleaders etc. use the approaches throughout the whole organization. To accelerate our journey towards this many decisions from top-management mentioned in 7.1.2 are highly needed. It is also requested by many managers, and will be highly appreciated.

**RADAR for Results**

Relevance	Explanation
<b>Usability</b>	
Scope & Relevance	A coherent set of results, including key results are identified and demonstrates the organization's performance-based strategies and objectives and the needs and expectations of the relevant stakeholders
Credibility/Integrity	Results are timely, reliable and accurate
<b>Performance</b>	<b>Explanation</b>
Trends	Positive trends or sustained good performance over at least three years
Targets	Relevant goals are set and achieved consistently for the most important results and are in accordance with the strategic direction
Comparisons	Relevant external comparisons and favorable for the main results and is in accordance with the strategic direction
Causes	There is credence to the attainment levels will continue in the future based on the knowledge of cause and effect relationships

When assessing **Results**, an organization first look at their Relevance to the organisation's strategy and how useful they are in reviewing progress against these key objectives, and then look at the performance of the results themselves. In practical terms an organization should be looking for:

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- Results which clearly show how the organisation is progressing against its key strategies for the criterion
- Reliable data that can be segmented to give a clear understanding of what's happening in relation to different stakeholder groups, products or processes.
- Positive trends over a 3 year period
- Targets, which are appropriate for the strategic objectives, being achieved
- Appropriate comparisons and benchmarks to put the results in context within the organisation's operating environment
- Evidence to show that the organisation understands the underlying drivers of the results and effectively managing them to ensure that performance levels will be sustained into the future

During 2013 while launching our support for our managers at all levels we started going from what to how when it comes Enablers and Measurements, Learning & Creativity and Improvements & Innovation in the RADAR.model. However, we still have a long way to the top (an audit score of 600 points or more) according to the scoring system in EFQM-model. Remember that the important things about the score are not the score itself, but what it means. It means that the organization has adopted approaches that will produce better results for its stakeholders. Nothing more and nothing less. A more challenging goal aligned with a long-term support will certainly unleash more of our managers and co-workers hidden and high potential according to the authors own viewpoint.

### **3.1.19 What about the results and RADAR?**

The prerequisites regarding enablers is installed, but the way towards measuring the results with high quality in the whole organization will take even more time. Our organization highly need to improve how we follow-up different activities. In short when studying the above criteria for results we instantly notice the importance of going further in what this paper stipulates, see 6.2.5. We have a very solid foundation for meeting the criteria for results in the RADAR-model for our approaches for management and leadership, and actually many of the other criteria and sub-criteria in the the rest of the model as they all are highly related to leadership.

### **3.1.20 Connections between EFQM-model, RADAR and our approaches**

The connections between our approaches and the whole EFQM-model and RADAR-framework are only available in ppt-format, but will be summarized briefly in the next version of this report.

### **3.1.21 Connections between the EFQM Excellence Model and Eurostat's Code-of-Practice**

The connections between the statistical production process (our core process) and the EFQM Excellence Model are only available in ppt-format, but will be summarized in the next version of this report.



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#### 4 Content in our management and leadership support

Our support to our managers is very extensive and it is hard to give the reader a detailed description in paper form. However, this section gives it a try and presents a brief and general overview of the contents of our management support.

*“The number of management and leadership principles you know (breadth) and how well (depth) you know and apply them determines your outcomes for yourself and your stakeholders”* Unknown

The Content-column in the matrices below describes the questions that each training session answers. The What-column describes what activities that has been done, the scope of each session, and in what kind of program it is included (Program for aspiring managers, program for new managers, and/or long-time support for our existing managers. The Who-column describes who/whom prepares and conducts the training for the different sessions. For some parts we use external management consultants, and for other parts we do the training in-house. We have a lot of in-house competence and great potential to unleash that potential even further.

Our organization undertook an extensive call for tender in order to select the external consultants that we use in our support. Our tender stipulated very high demands on selected consultants regarding coaching leadership style, business and leadership coaching, change management and personal efficiency. The How/Outcomes-column describes the output in very general terms from each session, home-assignments, training etc. Each single session in our respective program had numerous assignments, training etc.

##### 4.1 Before the programs

Content	What	Who	How/Outcomes
Content leadership programs?	<b>Before the programs</b>	Martin	Competence
Contents of the different parts?	Movie LP Aspiring managers	Lagerström	Goals programs
Preparations?	Movie LP New Managers		Goals management, leadership, person
Assignments?	(Movie LS		Goals groups/teams
Books? Training?	Experienced Managers		Books
How?	2014)		Reports
What do I want to achieve?	DiSC		Active learning
Management?	Personalityprofile –		Home assignments
Leadership?	Feedback/Feedforward		LISTA (The five levels of evaluation)
How do I go from knowledge, skills and abilities?	JobMatch Rekrytema- Feedback/feedforward		
	<b>Included</b>		
	LP Aspiring managers		
	LP New Managers		

#### 4.1.1 Movies

Before the start of the management and leadership program for aspiring managers, and our management and leadership program for new managers the author created experimental e-movies with Lectora Inspire and Camtesia in order to give the participants a general overview of the content of the programs both in general and specific terms. The content-box above gives examples of questions answered by these e-movies. A sidepurpose was also to inspire others in our organization to use these kind of communication in other areas such as branding, communication with external and internal stakeholders etc.

The main purpose with the movies was to give all participants an overview over the content of each program. One purpose was that all participants should have written down a first version of their long and short term goals according to the guidelines in the movies for their own personal, management and leadership growth before the start. That is to say, what they want to achieve and focus extra on regarding both management and leadership development during and after respective program.

The movies also included instructions on assignments, training, books, active learning techniques etc. Instructions was also given for how to integrate the transition from knowledge, skills and abilities even further.

Two examples are the LISTA-model (the five levels of evaluation) and the report that should be written by each participants. Besides completed home assignments, trainings and book-reviews a final and approved PM was an explicit requirement for getting a diploma.

An experimental movie- and e-learning material (the whole material covers over 70 home-made movies) has been developed and launched that gives an overview of the programs and support (only available in Swedish), and the goals etc. for the included individual sessions, see links below:

- [http://lexiconinteractive.se/temp/scb\\_ls\\_1](http://lexiconinteractive.se/temp/scb_ls_1)
- [http://lexiconinteractive.se/temp/scb\\_ls\\_2](http://lexiconinteractive.se/temp/scb_ls_2)

The potential to use e-learning in conjunction with educations, training and different external and internal activities are huge. However, in order unleash this potential efficiently and with high effectiveness our organization need to invest in a Learning Management System (LMS).

#### 4.1.2 Psychological profiles

To become a good at leading others, you must first become good at leading yourself. As you lead others you lead yourself. As you lead yourself you lead others. Leadership is thus the art of leading yourself. A true leadership occurs when others want to be led by you. A true leadership occurs when you lead your employees and your business in such a way that you and you co-workers realize your goals together with good results for your stakeholders and that you continually develop and improve yourself and each other in fruitful, creative and positive ways. Almost like you are one mind instead of separate minds.

*“To be a master of leading others, you must first be a master of leading yourself”*

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Leadership in successful businesses is therefore about to develop your own leadership skills in the first place. This also means that leadership and personal development is very closely related to each other.

We all approach leadership from an unique starting point – a combination of our own psychological make up, intelligence, training and experience. Research and experience shows that very few of us are prepared to lead. In order to be an excellent leader you need to broaden your definition of leadership, and acquire the relevant competencies and relationship skills needed to be a multidimensional leader. All leaders need to stretch beyond their primary leadership dimension and develop the necessary leadership behaviours that is required to be a truly effective leader.

Research consistently finds eight dimensions of leadership behaviour that organize the large collection of priorities, actions and attitudes that people demonstrate as they provide effective leadership. The 8 Dimensions of leadership is based on extensive research (40 years) of the DiSC model of human behaviour. The DiSC model of human behavior relies on an extensive theory and is a reliable and relevant system of psychology that helps explain how "normal" people think, feel and act based on the dynamic interplay of four major emotional reactions: Dominance, Influence, Steadiness and Conscientiousness. Research (Marston) propose that people express their feelings through four primary responses. It is very important to mentioned that this typology into four types is a huge oversimplification mostly done for pedagogical and practical purposes. It's like an onion. Behind this first layer of four types resides many layers, and it is important to know these layers in order to avoid stereotyping, misapplications etc. A certification in DiSC-modules combined with an in-depth understanding of cognitive psychology and behavior is important for applying it correctly.

These four types of emotional expressions are related to how a person view him/herself. Besides DiSC-research this is supported by other extensive related research within psychology, mental training (50 years research) and personal achievement – i.e. emotions are a big player that runs our behaviours (Uneståhl et al; Garfield et al; Hill et al)

*"Motivation is a fire from within. If someone else tries to light that fire under you, chances are it will burn very briefly."* Stephen R. Covey

A first starter to increase insight and awareness about ones own leadership make-up, i.e. one's own motives, strengths, blind-spots, core-values, development areas etc. is to conduct different evidence-based psychological tests before the start of each program. That first starter is like the first layer of the onion as and should only be regarded as a first starter for digging deeper in the layers. The selected participants had therefore each done a DiSC profile and other psychological tests before the start of each program. These test should be used for maximizing their growth during and after each program. They also got feedback and feedforward by certified personel at HR-department and a consultant firm before starting the program as a quidance for their individual leadership development during the program, and how to use them in

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combination with other sessions. Furthermore to use them in order to develop their short and long term goals as mentioned earlier.

**4.1.3 Support and network**

Each participant was offered a mentor as a support during the program and a while after each program. Besides that the starting session in each leadership program was constructed with principles from group and team coaching so that the participants could use some of these principles and processes to start coaching each other during and after each program. This have been highly appreciated according to the evaluation. Examples of integrated outcomes from our leadership program for aspiring managers, see 6.3.

*“Why play an instrument when you have access to a complete orchestra”*

The importance of enabling more team-based work instead of individual or group-work should not be underestimated. There is a vast difference between a group and a high performing team (Britton et al). Teamwork is very rare in many organizations (Wheelan). An excellent team work as they were one mind instead of separate minds. One mind that is developed through the harmonious cooperation of two or more people who ally themselves for the purpose of accomplishing any given task.

The following presentations will only focus on some areas of our support. To get a more detailed overview over the different leadership program and support the author refers to the movies, presentations and other material at personel department.

**4.1.4 Leadership profile for managers**

Content	What	Who	How/Outcomes
What does our leadership profile for managers mean in more definite terms? What are the connections between our leadership profile for managers and our management system , operational plan, and our statistical production process ?	From theory to practice and excellent results. <b>Included</b> LP Aspiring managers LP New Managers	Martin Lagerström	EFQM Leadership profile Management Leadership Competence Assignments Training PÖTT LISTA (the five levels of evaluation)
What characterizes managers in excellent organizations? What characterizes leaders in excellent organizations? Differencies? What competence, traits & behaviours are important? Which do I have? Which do I need? Which are most important? What kind of evidence-based approaches exists? How do I learn to apply them successfully?	Managers (2 days)		

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The first session in both programs was our leadership profile for managers. The length was two days. It was separated sessions for the new managers and aspiring managers. The specific goals etc. for each session is described in more detail in the movies. The main purpose of this session was to give the aspiring managers and new managers answers to questions in the content-column above.

The specific assignments for participants before this session was to watch the movies for each leadership program, conduct psychological tests and get a first feedback and feedforward, reports, what books, assignments to read and do etc. The most important reason to watch these movies was to start to develop long and short term goals for themselves and bring their first versions to this first session.

During these two days there was also four assignments (as described in the ppt-material to this session) regarding how to develop goals for themselves and their respective team (team aspiring managers and team new managers), the differences between management and leadership and its meaning to the daily operation, the connections between our management system and our leadership profile for managers. The special assignments for this session was instructions about the LISTA-model that every participant should complete after each single session in each program. Moreover, instructions and tips regarding active learning principles to be used for book reviews and the final PM at the end of each program was given.

This paper only gives a brief overview of the LISTA-model and the reports as these two are the most important ones with respect to the purpose and objective of this report. The foundation for the concluding report that each participant should write at the end of each program is also based on the LISTA model but it also includes other aspects that are important for evaluating effects of the programs. The participants should report according to the LISTA structure after each single session in the program both in order to integrate and deepen their learning and for our evaluations. For more information regarding this model see chapter 6.

*“Management is efficiency in climbing the ladder of success; leadership determines whether the ladder is leaning against the right wall”* Stephen Covey

**4.1.5 Personal development with a focus on leadership**

Content	What	Who	How/Outcomes
How do I develop as a leader and person? How do I develop my inner-leader? How do I develop my staff? How do I develop my staff? How can I use DiSC and other approaches such as change management, solution-based approaches, mental training?	<b>Included</b> LP Aspiring managers (4,5 days) LP New managers (3 days)	Consultant Martin Lagerström	Leadership How to use different modules of DiSC Solution-based approaches Training PÖTT LISTA (the five levels of evaluation)
How do I create a creative and innovative climate?	LS Experienced managers (3 days)	Lotta Lejerwiik	

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Personal development with a focus on leadership are very different in the different programs and in the long term support both when it comes to content, length and assignments. The personal development in our management and leadership program for aspiring managers focus on basic personal development areas such as gaining first insight and awareness about one’s own leadership style. Examples of assignments were personal diaries with specific instructions regarding self awareness, self-image etc. that the aspiring managers should use together with their psychological profiles, and personal goals.

The personal development in our management and leadership programs for managers focused much more on practical applicability. That means how to use the different psychological tools in different areas in their daily operation. Eight assignments in how to use and combine psychological tools with other approaches such as solution-based management was included in order to improve how to conduct performance appraisals, wagediscussions etc.

**4.1.6 Basics in goals setting I**

Content	What	Who	How/Outcomes
Why is goalbased management important? Why is correct goal principles important? Why is it such a rare skill in most organizations? How do I apply all the goal principles well? How is this competence related to our leadership profile, management-system, operational plan and core process? How is it related to other leadership skills? What are the differencies between visions, mission statement, goals and values in more concrete terms? How do you apply it? What and how do you develop clear mission-statments, goals , strategies that inspires to action and excellent results? What characterizes excellent visions, goals? How do I go from what to how ? How do I motivate myself and others? How do I deveop excellnt abilities?	<b>Included</b> LP Aspiring managers (2 days)  LP New managers (2 days)	Martin Lagerström	Basics goal-setting Visions. Mission-statements. Goals, Strategies. Actions. Important principles T-GROW (How Workshop Assignments PÖTT LISTA (The five levels of evaluation)

As a manager and leader the abilities in appropriate goal-based management and its principles is one of the most important skills to acquire. In fact, it could be regarded as the DNA of leadership skills as it is highly related to how well one can apply the other leadership skills such as change management, personal efficiency, coaching leadership etc.They are all highly dependent on this ability. SMART-goals are not enough by any means. All goal principles must be applied for excellent results.

*“Goals are dreams with fastforward moving legs”*

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There is no understatement to say that excellent abilities in the principles for goal-setting are very rare in many organizations. Many studies during the last 75 years estimates it to be as low as 1 percent. The basic course aim to give our managers the basics when it comes to knowledge, skills and abilities in how to go from visions, long- and short term goals that inspires to actions and good results in different areas. This session integrates principles from elite sports, mental training, coaching leadership, and other areas. The intention was also to prepare them thoroughly for the session on coaching leadership. It takes considerably time of practice to develop good abilities when it comes to these basics.

These abilities are also a prerequisite to apply more comprehensive and complete goal-based management processes (goals setting II not launched yet, only included in our business and leadership program). Complete goal-based management processes that includes practical tools for every single part in goal-based management. That is to say to complete processes so that both the managers and co-worker in conjunction lead, steer, develop, follow-up and continuously improve their, business, themselves and other areas. The session regarding basics in goal-based management was on two days and contained over seven assignments connected to goal-based management.

**4.1.7 Change management**

Content	What	Who	How/Outcomes
What is change? What is important? How do I prepare, carry through, and follow-up changes? How do I inspire my staff for changes? What are the common obstacles? What are the common successfactors? How do I handle resistance from co-workers?	<b>Included</b> LP Aspiring managers (1 day)	External consultants	Assignments PÖTT LISTA (The five levels of evaluation)
	LP New managers (1 day) LS Experienced managers (1 day)		

Change management is another important leadership skill. In order to function better as a manager in an organization that undergoes changes requires greater expertise in how changes affect managers and co-worker, and what practical approaches that exist in how to plan, execute and follow-up changes in a structured effective and efficient way. Examples of assignments was to conduct a fictive case in change management according to the principles they had learned and get personal feedback and feedforward.

Our preliminary results highly support the many evaluations that have been done of our management system since 2008. In 6.4.3 you get the numbers about our skills and abilities regarding change management.

*“All change is about knowing where to go and where you are right now, and then find approaches that take you where you want to go with good results”*

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**4.1.8 Co-worker appraisals, recruitment and decision processes etc.**

Content	What	Who	How/Outcomes
<b>Goal-oriented appraisals</b> How do I help my staff to develop mission-statements, long- and short term goals that inspires to action and results. How do I help my staff to grow as persons, leaders and to fulfill our goals in business?	<b>Included</b> LP Aspiring managers (2 days)  LP New managers (2 days)	Martin Lagerström	T-GROW Process before, during and after Assignments Home-assignments PÖTT LISTA
<b>Recruitment and decisions</b> How do I make good decisions when recruiting? How do I attract, recruit, retain, develop and improve my staff? What approaches can I use, and how do I use them? How do I make fact-based decisions? How to give better feedback and feedforward? What characterizes excellent decision-processes? How do I improve my decisions?			Recruitmentprocess Competence-based recruitment Tests Scenarios Assignments PÖTT LISTA
<b>Goal-oriented process employee-surveys</b> How do I work more goal-oriented with our employee-surveys? How do I involve co-workers in this process? How do I measure and follow up the right things? How do I create more engagement? How do I inspire my staff to take more initiative and responsibility?			NMI and application Example working processes Assignments PÖTT LISTA
<b>Wages appraisals</b> How do I prepare, carry through and follow-up? How do I clarify the criteria for wages? How do I communicate the outcomes better? What approaches can I use ?			Wages appraisals Our process Example working process LISTA

See table above. Important to add that other types of psychological tests was used before this session in order to give the participants a broader and deeper awareness and understanding of their behavioral traits that match different types of working assignments. These profiles were also used as an integrated part to the managers who want to improve their recruitment and decision processes.

Our organization has a lot to improve when it comes to recruitment and decision processes if the target is excellence. A blueprint for achieving this is our recruitment and decision process for aspiring managers. That process is a first attempt in our organization to include competence-based recruitment (M. Lindelöv) and combine that process with decision theory and practice etc. A movie has been made that explains the basics of this process for our managers as a foundation for feedback and feedforward conversations with applicants that not have been selected.

*“Quick decisions are unsafe decisions.”*



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**4.1.9 Personal efficiency**

Content	What	Who	How/Outcomes
How do I create more time for both management and leadership? How do I create more time for my staff? How do I execute meetings more efficiently?	<b>Included</b> LP Aspiring managers (3 sessions, 9 hours)	Consultants LeanOffice	Efficiency 5S Basics Lean Tailor-made programs 5S (From what to how and results) Sort Structure/Systemize(Organisera)
How do I use our working space, e-mail, systems more efficiently?	LP New managers (3 sessions, 9 hours)		Städa/Clean Standardize Habits for continuous improvements
How can our unit and/or department increase its productivity and its efficiency as a platform for improvements?	LS Managers (3 sessions, 9 hours)		Personal tailor-made support GAMBA (Action Plan) PÖTT LISTA (The five levels of evaluation) .

In order to work with both management and leadership it is important to create more time for leadership issues by increasing both the productivity and the efficiency of management tasks. Our data strongly support that we need to increase our efficiency and effectiveness e.g. in order to work both with management and leadership. Practical principles from Lean and LeanOffice in how to increase the efficiency by at least six hours per person and week is provided. The individual manager can do a lot himself/herself by transforming these principles to practice. However, it is also very important to mention that top-management need to clarify different issues in order to facilitate for our managers to execute these principles to the fullest in the whole organization, see 7.1.2.

In the chapter 6 some results are presented regarding this when it comes to e.g. meetings in our organization.

*“If you chase two rabbits, both will escape.” - Unknown*

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 Executive coach  
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**4.1.10 Coaching leadership**

Content	What	Who	How/Outcomes
How do I coach myself? How do coach my co-workers in excellent ways? How do I inspire my staff to take more initiative?	<b>Included</b> LP Aspiring managers (3 days)	External consultants	Coaching and values T-GROW Basics
How do I develop more leaders? How do I maximize co-workers potential? What is a group? What is a team? Differences? How do I develop groups into high performing teams?	LP New managers (3 days)  LS Managers (3 days)		Groups vs. Team PÖTT Assignments Books LISTA (the five level of evaluation)

The demands on managers to conduct a coaching leadership is increasing due to several reasons. The most important reason is the ROI-effect as described in 6.4.7 in this report. Coaching leadership is not the same as professional business and leadership coaching, which is much more extensive.

*"If you pick the right people and give them the opportunity to spread their wings—and put compensation as a carrier behind it—you almost don't have to manage them."* Jack Welch

This three days course aims to teach the basics from the principles of coaching so that our managers can start to adopt a more coaching leadership style where appropriate; coaching is not always appropriate in all situations. The session explores what a coaching leadership style is and when and how it can be used in leadership and their daily operation. The coaching approach is very powerful as it gives employees the opportunity to grow while freeing up managers own time. That means that it is also an important ingredient in increasing efficiency so that more time can be spent on leadership. The basics of group and team coaching is also included. The participants are given many practical approaches that can be used to improve both management and leadership in different situations.

This course is highly appreciated by our managers, new managers and aspiring managers. During the writing of this report formal group- and team processes has started on an experimental level for some managers who receives individual business and leadership coaching, see 5.1.1. The benefits for our organization will be huge if this is implemented in a broader scope as this is not just relevant for managers, see 6.4.7. Our organization has a lot of group-leaders, groups (FMOD-teams), group leaders etc. that should need this kind of support in the future. This support is not just suited for persons with manager as a title. A person can be a leader without a title, and our organization need to create more career alterantives in the future. Six Sigma or other similar systems could be used as a guidance.

*"Coaching is about unlocking a person's potential to maximize their own performance. It is helping them to learn rather than teaching them"* (Whitmore 2003)

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The sessions 4.1.11 to 4.1.13 below are only shown in matrices and will be commented in later chapters. We have a fruitful co-operation with our DG Office, and Communication department when executing these courses. The below courses has also been highly appreciated.

**4.1.11 Steer and control**

Content	What	Who	How/Outcomes
What external and interna factors are important for our operation?	<b>Included</b> LP Aspiring managers	DG Office Anna Heinstedt Carola Månsson	Rules, Directives Operational plan Process Ekonomy Checklists
How are these factors integrated in our operational plan? What rules, directives, laws are important? What are the most important for you as a manager? How does our process for operational planning look like?	LP New managers (1 day)		
What suppor systems do we have? Which systems are most important for you as a manager?			

**4.1.12 Communication**

Content	What	Who	How/Outcomes
How do you create a systematic structure for your communcation?	<b>Included</b> LP Aspiring managers	Communication department Anna Nyhlén Anna Molander	Communication system Tools Assignments
How do you communicate the right message to different stakeholders?	LP New managers (1 day) LSManagers (1 day)		

**4.1.13 Manager and responsibilities**

Content	What	Who	How/Outcomes
What does the manager role mean when it comes to laws. responsibilties etc? How does our process for wages and staff appraisals looks like? What kind of support can managers get from personal department? What are the most important questions for managers ? What can you do when conflicts arise?	<b>Included</b> LP Aspiring managers (2 days) LP New managers (2 days)	Torbjörn Lindström	Your role as managers Training HR-Support

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**4.1.14 Value-ground public sector**

Content	What	Who	How/Outcomes
Why is competence about the common values for the public sector important? What does it mean? How do you integrate it in your daily operation? What is the relation to our leadership profile for managers and management-system?	<b>Included</b> LP Aspiring managers (Self-studies) LP New managers (Self-studies) LS Managers (HR-support)	Martin Lagerström Birgitta Wahlström Örjan Gruvberger	E-learning (KRUS) Guidance and support for how Abilitie

Up to this date over 1 000 managers and co-workers have taken part of this education. The personal department has a fruitful co-operation with our data collection department in executing these education. We still have a lot to do when it comes to integrate the value-ground more into the daily work, i.e. from what to how. Personal efficiency is highly related to the sixth principle about efficiency, effectiveness and service in the value-ground for public sector in Sweden, which is highly prioritized by our Director General. However, we could already show some outcomes in going from words to actions such as our preliminary results presented in 6.4.1. Some examples are the data we have regarding personal efficiency. This will be developed further by the personal department and the collection department.

**4.1.15 Workshop in the end of each program**

A two day workshop in the end of each program (the management and leadership program for aspiring managers and the management and leadership program for new managers) was made in order to integrate the learning from the whole program even further and to maximize its usage for their own future as managers and hopefully also leaders. The prerequisite for the workshop was that at least half of the participants had started to write the PM. Only the participants of the management and leadership program for aspiring managers fulfilled this criteria. An approved PM was also a requirement to receive a diploma. The intention of the two days workshop was:

- to give each participants further guidance to specify his or her goals (e.g, through self-coaching with approaches they have learned) for their future as a manager and hopefully as a leader.
- to identify improvement areas for each participants individual growth regarding abilities, talents and behaviours according to their goals and the requirements in our leadership profile managers
- to summarize the effect of the entire program according the LISTA model for the aspiring managers, their unit, department, and for the entire organization.
- to reflect and share experiences of the conditions to be a manager and leader in our organization based on their PM , LISTA etc.
- to highlight important improvement areas to our top-management team

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Examples of documentation that the participants were instructed to use for writing their final PM and to maximize its usages for themselves is given below:

- their targets for the entire leadership program
- their PM for the entire leadership program.
- their LISTA for each single session
- their homework around each session
- their our book reviews
- report, articles during the program
- their network of other aspiring managers

A similar and not so extensive workshop is to be held for the new managers upon request when enough PM has been received.

Next, some examples are given from our more extensive support such as long term and tailor-made programs in different subjects.

## 5 Long-term programs in our support

### 5.1.1 Business, management and leadership coaching programs

Content	What	Who	How/Outcomes
What do I want to develop – business, management, leadership, motivation or all? How do I create challenging visions, long- and short term goals that inspires me to action and great results? What are my drives, motivations, challenges, fears, "blind spots", and how do I build my strengths and correct my weaknesses to become a better leader How do I motivate co-workers? How do I develop groups into high-performing teams? How do I use mental training to achieve goals with less effort, increase mental strength and to cope with stress; crucial life skills to perform and feel better in all aspects.	<b>Included</b> LS Managers (From 3, 6 12 months up to 2 years)	Martin Lagerström and other ICC/ICF/ABLC Certified business and leadership coaches & certified and licensed mental trainers	Extensive Long term programs Operation Management Leadership Motivation Personal Mental training Many different parts

Extensive programs in business, management and leadership coaching and mental training. The program is tailored-made to what the specific manager want to develop. The aim of executive, business and leadership coaching programs is sustained cognitive, emotional and behavioral changes that facilitate goal attainment and performance enhancement either in your profession and/ or in your personal life.

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A standard program consists of one starting session of four hours in order to decide what the manager want to develop regarding their business, management, leadership, personal development, motivation or a combination of them all. An agreement is also made regarding the length of the program that could vary between 3 months up to 2 years depending on the ambitious level.

The starting session is followed by ten individual session of one to five hours each depending on the agreement and ambitious level in the starting session. For example of ROI-estimates see chapter 6.

**5.1.2 Change management – certified change manager**

Content	What	Who	How/Outcomes
What is change? What is important? How do I prepare, implement and follow-up changes? How do I handle resistance from staff? How do I inspire people to change?	<b>Included</b> LS Managers (3 days)	External consultant	Certified in change management

We also offer our managers a more extensive training in three days in change management. This training requires at least 15 participants, and leads to a certification in change management. The managers that have completed the basic one day course in change management are very interested to continue with this training, but up to this date it has not been possible to execute the certification training due to difficulties to jointly assembly 15 managers for the same three days.

*“Be the change that you wish to see in the world.”* Mahatma Gandhi.

**5.1.3 Workshop change management**

Content	What	Who	How/Outcomes
What support do management teams, department and unit managers get when facing changes?	<b>Included</b> LS Managers (4 hours)	External consultant	

A workshop in change management is offered to our top-management and other managers. The content consists of parts from change management I with a focus on ADKAR and managers, co-workers and other stakeholders roles and responsibilities in change projects.

*“If you do not change direction, you may end up where you are heading”* Lao Tzu

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**5.1.1 Personal efficiency for unit managers**

Content	What	Who	How/Outcomes
Tailor-made support	<b>Included</b> LS Managers	External consultant	

**5.1.1 Personal efficiency for department managers**

Content	What	Who	How/Outcomes
Tailor-made support	<b>Included</b> LS Managers	External consultant	

We also offer further support to our managers and management teams in personal efficiency for unit managers and department managers. These programs integrates more of the original Leanprinciples. The starting course focus mostly on the tool 5S and value-chain analysis on a basic level in order to free up time from management to leadership etc. These programs are tailor-made support in how managers and co-workers could increase its effectiveness in different issues. The length, content, scope and ambitious level depends on the agreement between the consultants and the manager.

*“Efficiency is doing things right; effectiveness is doing the right things”* Peter Drucker

**5.1.1 Management guidance**

Content	What	Who	How/Outcomes
What management questions are in line? What support do you get from consultant and your colleagues? What approaches can you use?	<b>Included</b> LS Managers	External consultant	Program four meetings per year Network managers Experiences other managers Approaches. Support

*“A leader knows the way, shows the way and goes the way”*

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## 6 Effects

### 6.1.1 What is important when measuring effects?

Why it is important to take a new look at measuring the effects could be found in many research findings. Extensive studies regarding the effectiveness of different educations, workshops and training shows rather depressing results. The outcomes are temporary at best (Uneståhl et al). What are the major reasons?

According to paragraph two in the Swedish law for higher education the goal for all education is personal development. Personal development is however unfortunately not defined in concrete terms in this law. Personal development means that participants should perform and feel better at work and other life areas after an education. Development of knowledge is therefore not enough for achieving that goal. Personal development requires that knowledge is transferred to skills and then to abilities. That requires systematic training and practice. Traditional courses must therefore be combined with a process of training and lifelong learning just as in e.g. sports. Mental and other training (which is all the training that is not physical) will certainly be a part of all excellent educations in the future.

Why and what to measure is equally important as how and when to measure the outcomes. What an organization should measure is skills and abilities not only knowledge – *“knowledge without application brings no profit”*. A lot of learning experiences inside and outside organizations purport to teach a skill, when really all they do is to introduce the skill at best. Many organizations mostly measure knowledge, if the venue, food was good, and if trainer was able to inspire the participants etc. Does this suffice? No, not at all by no means.

The most important thing remains to be measured, i.e. development of skills and abilities important for managers growth regarding personal-, management-, leadership, group and team development etc. Abilities needed to initiate change, development and sustainable results in their daily operation. Evaluation should always be done against the goals for the different courses. These goals should then include skills and abilities and be constructed with the principles for excellent goal setting in mind. It is very important that these goals fulfill all goal principles. That is the only relevant yardstick if one is interested in long-term results.

How an organization measure the short and long-term effects is also important. In order to measure the relevant benefits in relation to the costs correctly an organization need to employ a combination of several different approaches. The foundation for this is application of advanced statistical methods, processes and tools. Some organization does not measure the costs and benefits at all. Other measure them, but in an incomprehensive way. It is important to measure both the tangible and intangible aspects regarding the benefits and costs. That requires, among other things, a definite purpose and concrete goals, which is very uncommon in both the private and public sector.

When an organization measure is another important and unfortunately often neglected issue. How can an organization assure that the programs, courses etc. leads to development of skills and abilities and not only knowledge? According to



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many studies, the common procedure to evaluate is after a course e.g. by participants filling out a questionnaire about what they like about the course, the trainer, the food, the venue etc. You've probably been on such a course yourself. Think about it. What does this say about the training? Of course, nothing at all. If the criterion for a course is that it should lead to development of skills and abilities after the course, then you obviously can not measure it direct after the course. The only thing that could be measured during and directly direct after the course is knowledge – not skills and certainly not abilities. However, with the right evaluation instrument you are able to capture the participants potential for developing skills and abilities.

*"We have to choose to see people in terms of their future potential, not their past performances." John Whitmore*

But if you agree that the most important change is that the participants should perform and feel better after the course by applying the learning well then it is of course impossible to measure it that way.

A simple step to go a little bit further is to add the question "*What decisions have you taken during the program or course on what you intend to do when you get back in business*". Then you will probably get many good suggestions and it may look as if the course has resulted in great results. If you then follow-up after say three months to study what actually has happened you will, as many studies indicate, probably find that it has not happened much at all. The participants is the same persons as before the course despite all inspiration and good approaches they have learned.

### **6.1.2 What are the counterstrategies?**

If you can define the outcome you really want and give examples of it, and identify how those consequences are observable in definite terms, then you can design reliable and valid measurements that will measure the outcomes that matter. What really makes a measurement of high value is a lot of uncertainty combined with a high cost of being wrong. Information has value because it reduces risks in decisions, i.e. what to measure and then how to measure it. In technical terms you need to compute the value of information in order to see what measurement that are justified, and which are not. A fruitful counterstrategy to the above pitfalls is to measure the effects from five different levels in conjunction with measuring both during and six to one year after the completion of each program, education and course. This is exactly what we are going to do.

### **6.1.3 The foundation for our evaluations**

The material that serves as a first evaluation of the effects is very extensive. A comprehensive and detailed description of this material deserves several reports in turn. Therefore this report only highlights the main findings on a general level.

The theoretical foundation for evaluating our management and leadership program for aspiring managers are 14 PM, 14 book reviews, 280 LISTA, 14 book reviews

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and seven home assignments. The majority of the aspiring managers completed all assignment in time which is very impressive indeed.

The theoretical foundation for the evaluating our management and leadership program for new managers are: 8 PM, 160 LISTA, 8 book reviews and eight home assignments. Only a minority of the new managers completed all assignments in time which is very understandable due to their work-load. Most of the new managers have completed their PM after the time-limit.

The learning for the organiser is to consider and adjust the time limit for the next programs. More personal at HR-office should also be involved in the future both as a quality check, to lessen the work load, to increase the quantity and quality of our service to our managers and to improve our programs even further. We have a lot of potential at our department that need to be unleashed to the benefit of our stakeholders.

#### 6.1.4 How to measure the effects

The LISTA-model and it's five levels also serves as the foundation for the participants PM and for our first evaluation

1. Reactions. What did our managers like about our programs, training and support? The first level measures participants' attitudes towards the program, including perceived value and general satisfaction with a variety of the program (there may be a low correlation with actual learning or subsequent application of learning)
2. Learning/Insights/Strengths. What did our managers learn? What new insights did they get? What new talents and strengths did they acquire? The second level measures knowledge and the first transition to skills acquisition from the program.
3. Applications. How have our managers applied the learning and insights from the different programs, training and support? The third level measures the application of knowledge and skills back on the job or in real life. It measures abilities.
4. Results. What are the short and long-term results from different perspectives? It measures the depth of abilities acquired. The fourth level assess the impact of learning on organizational results, such as e.g.
  - increased efficiency
  - increased productivity
  - reduced costs
  - reduced turnover
  - greater number of projects/contracts
  - increased revenue
5. Return-on-Investment (ROI). What are the cost-benefit ratio? Is it possible to measure ROI-effects in a reliable and relevant way? The fifth level concerns more comprehensive measurements of the cost/benefit-ratio. Both the tangible and intangible sides of the benefits should be included. This is a considerably challenge to undertake, but a challenge that should be highly suited for a statistical agency that strives towards world-class.

*"The word impossible can not possibly be said about the future"* Uneståhl.

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## **6.2 Outcomes according to the five levels**

### **6.2.1 Reactions – the first level**

Our aspiring and new managers are very satisfied with the whole programs and each of its sessions according to received PM, LISTA and other evaluation material. It is very satisfying reading to observe the high energy and ambitious level from all aspiring and new managers. Especially satisfying is that most of them have applied their learning in so many different and fruitful ways.

The participants attitudes towards both towards the program, trainers and especially to coach, train and use each other (their network) with the basic principles from coaching and group and team coaching was highly appreciated by all participants. They still use each other as support after the programs.

The issues that were especially appreciated according to PM, LISTA etc. was:

- the connections between our management system and management and leadership in practice and what approaches to use and how to use them
- to start to develop long and short term goals for what they want to achieve with their business, management, leadership and personal development
- How to use the different processes, assignments etc. during the courses such as team-based goal processes etc in order to use each other (the network) for home assignments, training, and how to integrate some approaches at their unit or department and other issues during the program.
- The manager role and related responsibilities. Especially the new managers found it very valuable to discuss basic responsibilities, laws, wage negotiations etc. .and what kind of support they can get from the personel department in different areas.

The approaches that were especially appreciated among both the aspiring managers and new managers were.

- Coaching leadership in how to use questions, a coaching leadership style, core competencies needed and the many practical tools in how to unleash more of their own and their co-workers potential, the basics of group and team coaching etc.
- The basics in goal-based management in how to develop visions, goals that inspires to actions and results.
- Our leadership profile and its relationship to our management system and core process, and its connections to the content in our programs and support for managers.
- Change management in how to prepare , execute and follow-up changes and to get more people on the bus and in the right seats.
- Personal development with a focus on leadership especially to get further insights and awareness about their drives, motivations, challenges as well as fears and “blind spots” are ; and how to build on their strengths and correct their weaknesses to become a more multidimensional leader.
- Personal efficiency for individuals and teams in how to create more time for leadership while managing the manager role etc.

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The personal development included in our programs and support is rather extensive both to breadth, depth and length. However, this could be extended even further in future programs or in other forms as it is highly related to both management and especially leadership. Participants reactions according to the above may or may not have a low correlation with actual learning or subsequent application of learning. That is why the second level in our evaluation system is important.

### **6.2.2 Learning/Insights/Strengths – the second level**

The second level measures knowledge acquired by participants and the first transition to skills from the programs. Our findings are definite here that the participants gained many new insights, learning and acquired new strengths and development areas regarding themselves and others. The material is especially clear how they experimented and used the different approaches included in the programs at their unit and/or department, and even in their home (cross-training).

The results also reveals that the network of aspiring and new managers have met frequently and use the approaches to coach each other both during and after the programs. The material illustrates how it have deepened their learning, insights and strengths and confidence to experiment and use the approaches from our programs. Moreover some participants acquired a totally new perspective on leadership compared to when they started the program and as a consequence changed and improved their goals for themselves vastly.

### **6.2.3 Applications – the third level**

The third level measures is very important as it measures the degree of application of approaches learned in our support. It is a first measure if knowledge has started its transition to skills. The evaluation shows very impressive results when it comes to applications of the included approaches. In fact, applications have been done both during the programs and strategies been developed for application after the programs. The majority of incoming PM from both the aspiring managers and the new managers clearly illustrates goals and strategies for application of the approaches both at the unit and department level, but also in their private lives. An example is given in 6.3.

### **6.2.4 Results – the fourth level**

The fourth level measures the short and long-term results from applying the included approaches from different perspectives. It is a first measure of abilities. Abilities is a set of skills so integrated in yourself that you can apply it without thought. That level requires 10 000 hours of focused training according to research, and should not be the target level here. The third level also tries to assess the impact of learning on organizational results, such as e.g.

- increased productivity
- increased efficiency
- reduced costs
- reduced turnover
- greater number of projects/contracts
- increased revenues
- Etc.

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This paper only describe some preliminary and interesting results from some areas within our organization. These results are far from comprehensive, but gives a clear direction of the possibilities and potential to meet future challenges facing all authorities such as e.g. increased productivity and efficiency etc. Our findings illustrates that we need more data in order to draw better conclusions regarding the long-term effects. We also need to develop more reliable and valid approaches to capture them such as the better approaches mentioned in 6.2.5.

When it comes to evaluate short-term effects it is also important to mention that our management at all levels need to significantly improve their abilities in goal setting, cost-benefit analysis etc in order to measure the effects on basic levels. In section 6.4 you will get some examples of first results regarding the data we have so far from different perspectives.

### **6.2.5 Return-on-Investment (ROI) – the fifth level**

The fifth level measures the Return-on-Investment (ROI), risk-to-return, or the cost-benefit ratio. The reason why better measurements or ROI-methods is important to a business or a government agency is because of the existence of risks and opportunities. It is also needed according to our management system e.g. RADAR-framework. Opportunities and risks appear due to uncertainty. All decision is under some kind of uncertainty. Information reduces that uncertainty. Decisions are based on information and affects the behavior of others. Behaviours has economic consequences. Thus information alone has its own value. That value is important because it is often very high. Determining how much risk is acceptable for a given return in more quantitative terms is a critical part of an organization's decision making, risk analysis, investments etc. for important decisions. The solution lies within a a field of mathematics called "decision theory", an offshoot to game theory.

The fifth level concerns more comprehensive, reliable and valid measurements of the cost/benefit-ratio. Both the tangible and intangible sides of the benefits should be included. This is a considerably challenge for an organization to undertake if you want to describe the effects in more reliable, valid and user-friendly ways. It requires an combination of several approaches from both statistics, economics and other areas. It is not an understatement to say that our organization has a lot to do when it comes to ROI-estimations.

In many organization there are a spectrum of different ROI-methods. The spectrum are from using no cost/benefit calculations at all to worse than useless methods. In the middle range organizations are using baseline approaches and in the other end better approaches. Very few are using excellent approaches for doing credible cost and benefits analysis of both the tangible and intangible aspects. Exceptions are the e.g. the insurance-, oil-, and nuclear industry. Industries that are highly dependable on excellent methods for making decisions-, investments etc. A reduction in uncertainty in these industries are highly needed in order to make better decisions as the consequences could be very severe.

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The most common ROI-methods in organizations (Hubbard) are mentioned below.

1. No ROI-methods are used at all. The organization is not able to answer the question "*how do you know that it was a success, good investment, decision etc?*" It is important to know that the benefits exceeds the costs compared with other decision alternatives. In fact, all decisions, risks, benefits etc. in any project investment ultimately can be expressed by one method; ranges of uncertainty on the costs and benefits and probabilities on events that might affect them and the consequences that could follow.
2. The "worse than useless approaches" usually involves using ineffective methods with great confidence even though they add error to the evaluations and decisions. Perhaps much effort is spent on seemingly sophisticated methods, but there is still no objective, measurable evidence that they improve on intuition. These "sophisticated" methods are far worse than doing nothing or simply wasting money on ineffectual methods. They often cause erroneous decisions to be taken that would not otherwise have been made.
3. Worse ("the merely useless"). Detailed "soft" or "scoring" methods are used, or perhaps misapplied quantitative methods are used, but at least they are not counted on by management. This may be worse than the baseline approach mentioned below, except that they actually did waste time and money on it.
4. The baseline approach is where intuition of management drives the assessment and mitigation strategies/alternatives. No formal decision management of estimating the costs and benefits of their different alternatives is attempted. It is not possible to say if it was a good decision, investment etc. or not.
5. Better. Quantitative models are built using at least some proven components; the scope of decision management expands to include more facts about decision alternatives, reliable and valid estimates of costs and benefits are made etc. It is possible to improve decision making skills.
6. Best. The firm builds robust quantitative models to run simulations; all inputs are validated with proven statistical methods, additional empirical measurements are used where optimal, and portfolio analysis of costs/risks and return is used. Always skeptical of any model, the modelers check against reality, and continue to improve the risk models with objective measures of risks. Efforts are made to systematically identify important decisions, risks etc. in the organization.

Prior to making a measurement, and organization need to answer the following questions in detail

1. What is the decision this measurement is supposed to support?
2. What is the definition of the thing being measured in terms of observable consequences?
3. How, exactly, does this thing matter to the decision being asked?
4. How much do we already know about it now? What is our current level of uncertainty? How do we reduce that uncertainty level to an appropriate level?
5. What is the value of information? Is it worth to measure? How much should we pay for information that reduces the uncertainty to an acceptable level?

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Once an organization answers the first three questions, it can determine what it know now about the uncertainty, the amount of risk due to that uncertainty, and the value of reducing that uncertainty even further (the value of information). After answering question four and five above, an organization not just know *how* it should measure something, but *what* they should measure. The good news is that is also could be done with high quality.

*“Risk is not knowing what you are doing”*

The author’s own opinion is that our organization mainly resides at stage one when it comes to ROI-methods, and that for important decisions we need much better approaches regarding decision making, risk analysis etc. Our organization has a lot of improvement work ahead of us within the ROI-domain. That is not an understatement. However, we also should have a better potential than most other organizations to improve this with our army of good and creative statisticians. The personell department are looking at approaches to do this well within management and leadership, and hopefully this can lead to a fruitful co-operations with open-minded statisticians.

Some examples to start going in that direction could actually already be shown such as e.g. our new recruitment and decision process for the program for aspiring managers. That process builds on competence-based recruitment and combines it with excellent approaches in decision management such as e.g. how to integrate tests, scenarios with decision criteria and criteria for evaluation such as pair-ranking , decision matrices etc. It is possible to give much more concrete feedback and feedforward to selected and not selected participants. A movie has been made that describes the basics of this process for our managers.

Other examples are the first and simple cost-benefit analysis that has been done when it comes to personal efficiency with LeanOffice and our business and leadership programs that are described in section 6.4. It is better doing something compared to nothing and explain the basis for that doing in order to improve and move forward.

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## **6.3 Examples integrated outcomes**

### **6.3.1 Example PM – program aspiring managers**

The PM from both the aspiring managers and the new managers are all very impressive when it comes to the levels in the LISTA-model. They are all rather similar in nature when it comes to what, how and results. Both the author of this PM (who read all the material) and our Personnel director are very impressed by the potential. It is important to mention that the other participants PM shows similar good and impressive intentions.

An example is given below from a teamwork of four aspiring and creative managers together with their department manager. This example PM is 19 pages and only the main points will be summarized below. Their work is a great example of integrated outcomes so far from this leadership program.

#### **6.3.2 The PM as a teamwork**

The idea behind their collaboration were to combine and integrate both the theories books, assignments and approaches learned during the leadership program with their own experience. The overall intention was to transform the learning into creating value and improve our organization in many different aspects.

The overall motto in their PM is *“To think is great, but to do is bigger”*, which is also the creative title for their PM. This is highly related to the principles for the trainings for each session. Especially credit to the department manager at our ES-department who challenged the aspiring managers to use the approaches strategically in order to improve the whole department.

#### **6.3.3 The five performance areas**

This team identified five key performance areas for developing and improving their units, departments and later the whole organization. Taken together all these parts strengthen the department to unleash more of its potential.

These five areas are related and should be integrated into the daily operation. The five key performance areas are:

- Co-workers
- Change
- Value
- Communication
- The whole

For each of these five areas they specified what they want to achieve not mentioned in this report. However, the long- and short term goals need to incorporate more of the principles, rules etc from the session basics in goal settings such as the principles, criteria and guidelines needed in order to show achieved outcomes in more definite terms.

This is followed by how they intend to achieve this by using the approaches and other things they have learned in the leadership program.



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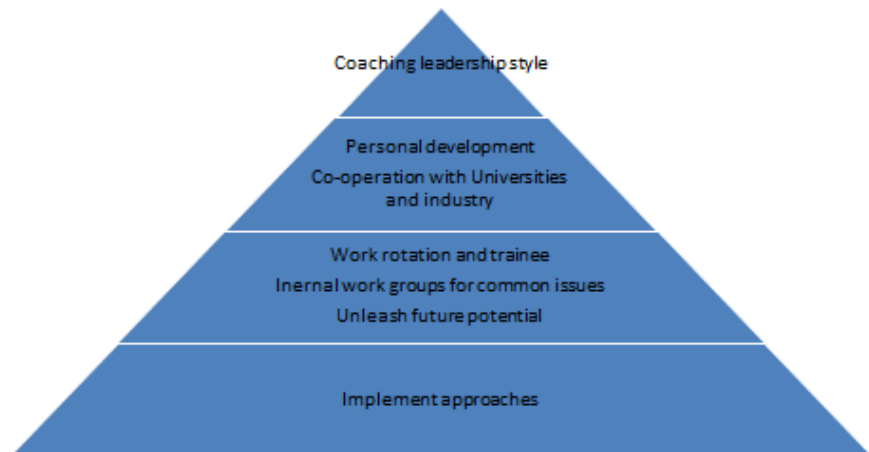
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**6.3.4 Co-workers**

The inspiration for the first performance area Co-workers were mainly the approaches, assignments, home assignments, books from the following sessions in the program

- the first session leadership profile for managers (EFQM, leadership profile and assignments on management and leadership and team processes). They also used the assignments such as group and team processes, their own goals for developing themselves and their leadership and integrated recommended leadership books.
- the session on goal-based management (T-GROW, MAKTEN, SMAK) and related assignments and home-assignments
- the session on personal development (KASAM etc) and related assignments and home assignments
- the session on coaching leadership and its principles and related assignments and home assignments

**Co-workers**

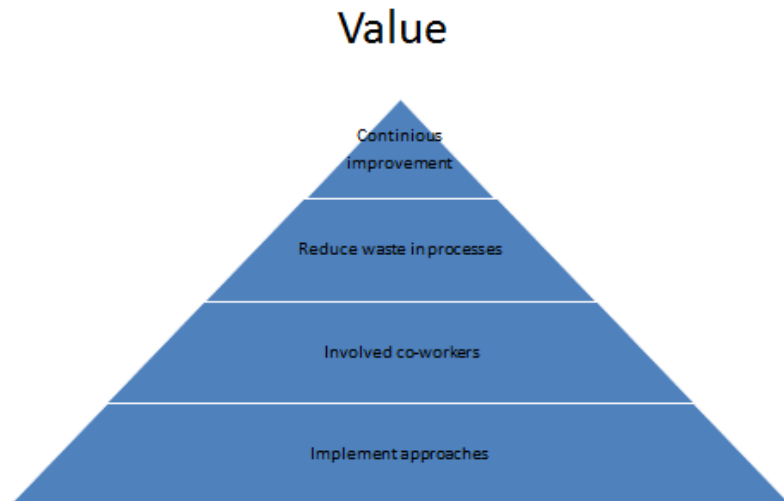


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**6.3.5 Value**

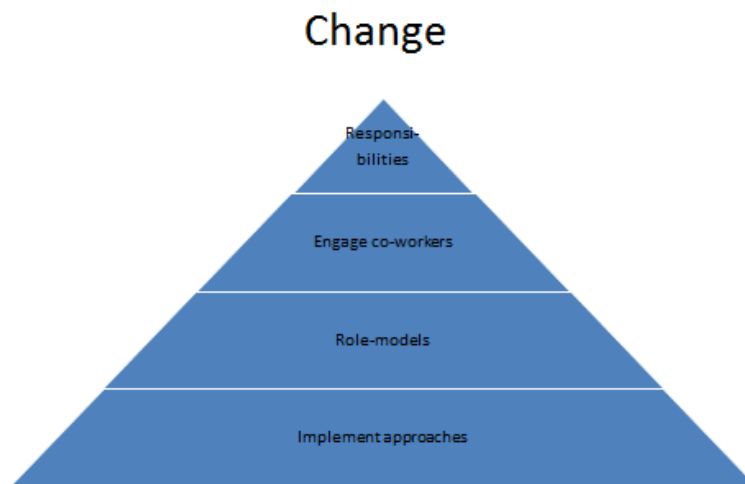
The inspiration for the second performance area were the courses in personal efficiency with Lean and the course on communication. In short, goals and strategies have been created in order to increase the value for different stakeholders by e.g. visualising processes, improve, simplify and streamline working processes. The team has correctly identified that Lean is a way of thinking - a philosophy - about constant and never ending improvements and creating value efficiently to our stakeholders.



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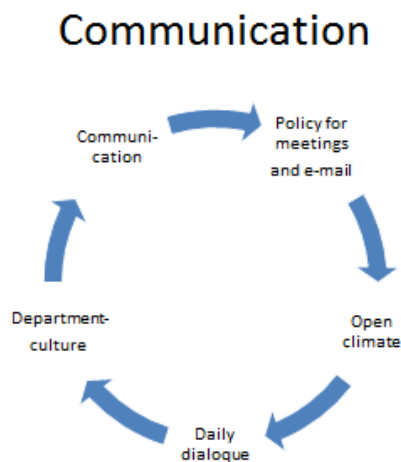
**6.3.6 Change**

The inspiration for the third performance area were the courses on change management and goal-based management. The approaches learned in these session will be used to prepare, carry through and follow-up changes and inspire people in a much better way.



**6.3.7 Communication**

The inspiration for the fourth performance area were approaches learned in the sessions on our leadership profile (especially the assignments about efficient leadership) and to handle conflict better as learned in the course in personal development. They have also used the course in personal efficiency with lean and stakeholder analysis learned in the course on communication.

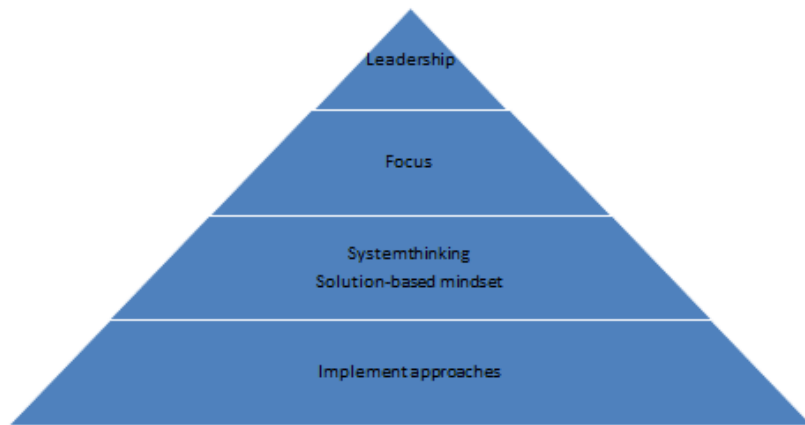


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**6.3.8 The whole**

The inspiration for the fifth performance area were all approaches learned in the management and leadership program and its relationship to our management system and leadership profile for managers. That is to say, what and how they can combine and use these approaches together with their department manager and co-workers in order to improve the whole department/ system in a positive way. Step by step beginning with the low hanging fruits.

**The whole**



Time will tell if their PM stands the brutal tests of time. A first indicator of this will be the evaluation that will be done after one year. The guiding questions will be what has happened? What results have been achieved?

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## 6.4 Examples ROI-estimates

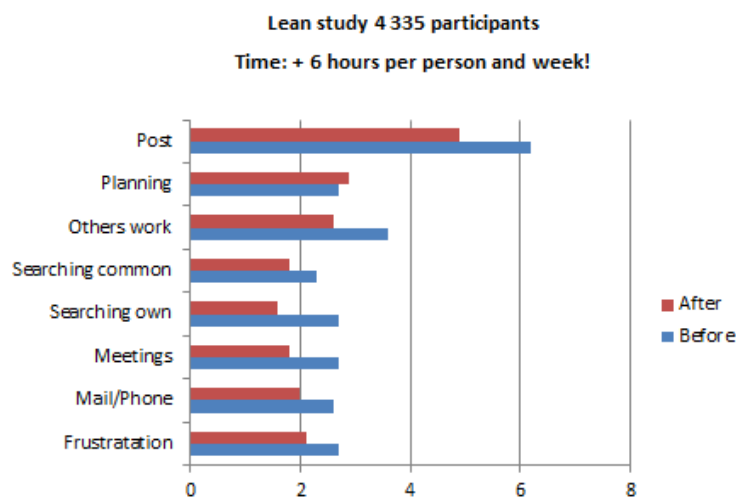
In this section we give some preliminary data and calculations outside our organization and within our organization with respect to personal efficiency for individuals and groups with Lean, change management and business and leadership coaching. A discussion of improved approaches regarding these calculations is discussed directly after these examples.

*“Where facts are few, experts are many” Unknown.*

### 6.4.1 Personal efficiency outside our organization

Examples of Lean-studies outside our organization regarding the Lean-tool 5S illustrates that every person could save at least six hours per week when applying the basics of Lean 5S. The diagram below shows one example of such a study which includes over 4 000 participants. If managers and co-workers start a jointprogram in Lean 5S the savings are of course much greater. Up to this date no department or unit manager have launched the more extensive programs in Lean that is offered in our support. These programs go way beyond the basics in the basics learned in the first basic course in personal efficiency.

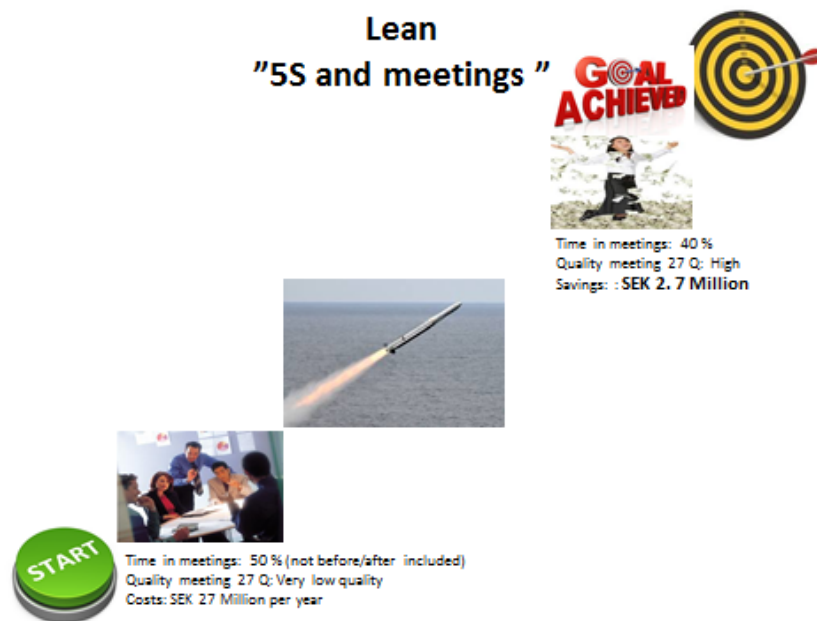
The cost to benefit ratio is easy to calculate for every person when it comes to the Lean-techniques in our support. The costs are educations of 9 hours and alternative costs for lost work in 9 hours. The benefits are forever when the basics of 5S have been applied with a quarantee of at least six hours per person and week. However, in order to show the outcomes for others it requires that more of the basic goal principles are applied. The benefits are of course different for different people and different work assignments. The reader can do the math him- or herself.



### 6.4.2 Personal efficiency within our organization

The data we have accumulated so far illustrates some major improvement areas in our organization when it comes to how we work. It is not what we do, but how we do what we do for some areas that could be changed according to these data.

For example, if we study the data we have for time spent in meetings by our management we get the following preliminary data shown in the ppt-picture below.



The ppt-picture illustrates our findings so far regarding the data we have accumulated regarding managers meeting.

The present state (start) concerns managers evaluation on how much time they spend in meetings in average terms according to the definitions of meetings in this questionnaire. Time for preparing meetings and time needed in order to follow-up meetings is not included in these calculations. Furthermore, co-workers participation and so called alternative usage of the time (alternative costs) are not included either. Only managers time is included.

The approximate cost for a manager per hour is in this example set to SEK 500 per hour, which is an underestimation of the real costs. This example only serves to highlight the potential for increasing productivity and efficiency by adopting different work approaches. I want to highlight that this potential only concerns one small area – meetings. If these principles are extended to other areas such as e.g. ineffective IT-systems such as e.g. our travel system etc. the effects are much greater.

In addition to how much time managers estimates when it comes to meetings, their estimation of the quality of meetings is also an important measure. Managers estimated the quality of their meetings (quality of time spent) by answering 27 questions from the Lean 5S toolbox.

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Some examples of such questions are:

- Was the meeting announced correctly and on time?
- Was the agenda sent out in good time before the meeting?
- Was the right people invited to the meeting?
- Was a clear purpose and goals specified for the meeting?

Under these very conservative assumptions the cost per year for our managers meetings is SEK 27 million. This is well spent time if- and only if - the managers judged the 27 questions favorably. On the other hand, it includes a lot of sunk cost if the average score is low according to these questions. Our managers estimation was low. That means that a lot of this time, or yearly cost of SEK 27 million is waste and could be improved. The same conclusions could be drawn for other types of waste such as our IT- systems, how much of co-workers potential that is not used due to unclear roles, responsibilities, goals etc. This is also related to the sixth principle in the value-ground for the public sector which concerns effectiveness and service. A definite decision from top-management is highly needed in order to start unleash this potential and to take measures in order to work in new ways and lessen the work-load and burden on many managers. This is an important future challenge facing all organizations as our and other Director General's in the world clearly says. We need to increase productivity, effectiveness and efficiency. The good news is that is within our own control. It is up to us.

Assume that our organization establish a measurable and attractive target that motivates people to improve meetings. For example, say that within one year 40 percent should be spent on meetings, and that these meetings should be with high quality as measured by the 27 questions. This is the desired states or the bull's eye.

That means a 10 percentages decrease in relation to the present state, and should not be hard to achieve. That means at least SEK 2.7 millions in savings per year according to the (very conservative) assumptions given in this example. Time that e.g. our managers could use for improving customer services and products, develop co-workers etc.

This is also highly related to our current study regarding our managers work load (Blommengren, Hammarlund & Lagerström). That study – not finalized yet during the writing of this report - shows some very interesting strategic results that will be presented in an updated version of this report. These results should be highly relevant for all organizations that strives towards excellence.

### **6.4.3 Change management**

Studies outside our organization and within our organization are presented here very briefly.

*"The only constant is constant change."* Unknown

### **6.4.4 Change management studies outside our organization**

Research studies outside our organization shows a very strong relationship between this leadership skill in change management and successful changes. A change is successful if it meets it goals on time, within budget and is aligned with

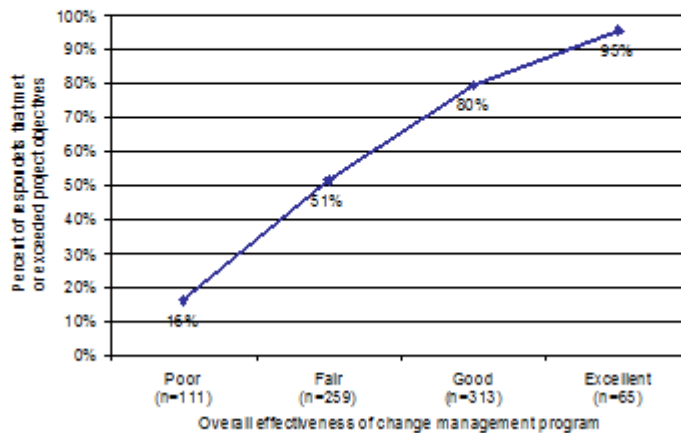
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stakeholders needs, demands and requirements. These studies indicates that managers, co-workers, groups, teams ranked over 50% of their top-management and managers as having only moderate to very low understanding of their role in managing the people side of change. It is important that correct goal principles are applied in such a way that projects are completed on time, within budget and high productivity, effectiveness and efficiency and that evaluations of the costs and benefits are possible. That is – again – related to skills in goal principles. The number one obstacle for major change projects according to these studies and others is employee resistance and ineffective management of the people side of change. That is related to skills in change management and the other leadership skills that are included in our support.

### Benefits of Change Management



Correlation of change management effectiveness to meeting project objectives



© Prosci. From Prosci's 2009 Best Practices in Change Management benchmarking report

#### 6.4.5 Change management studies in our organization

The many evaluations of our management system for quality that have been made by EFQM-experts and different consultants since Director General’s decision 2008 clearly illustrates how much top-management and managers at all levels need to improve this subskill of leadership together with the other skills included in our management support such as the basic goal principles. For example, if we are interested in facing the brutal facts in order to improve this skill in the future we need to be honest about this. For example our goals formulated after Director General’s decision about our management system we developed a goal to be certified according to the ISO 20252. That goal was originally meant to be achieved november 2009. It was achieved 2014. That’s a five years delay. The other parameters of change is not possible to answer as no cost-benefit calculation has been made. Our original target at the same time for EFQM-points was 450 points of a maximum of 1 000 points. We received 200-250 points by EFQM-experts 2009.



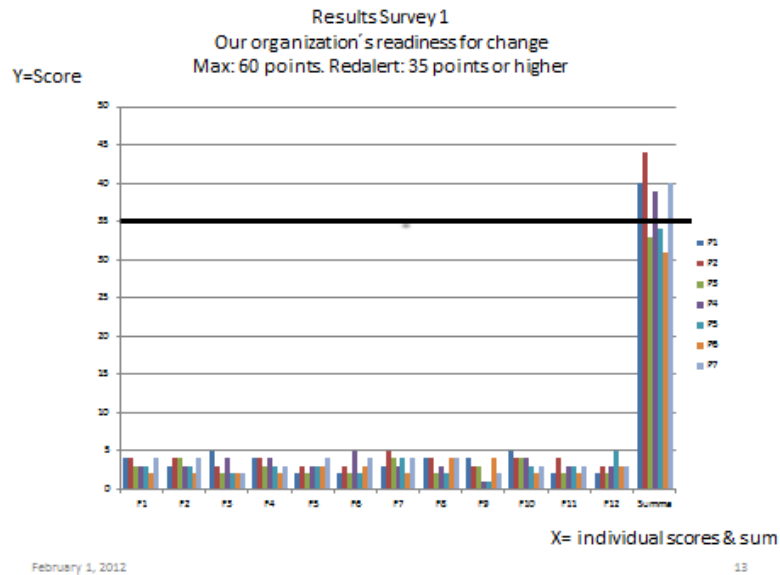
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Up to this date our organization has not yet achieved this goal. In my book of rules that is not a success. That is definitely not a success according to the demands in our management system for quality. However, a positive attitude and mindset is always the right way to go. We should get close in our next evaluation because our organization has done a lot since 2009 such as e.g. finally received a ISO 20252 certification, documented our processes, improved quality assurance in our production systems etc. When it comes to our management and leadership support we should also be able to show a significantly increase in points received in future evaluations. Again, it is not about the score. Its about the principles and approaches that is beneath the scores that is important.

Besides the evaluations of our management system for quality our own data strongly confirms the consultants opinions from 2008 and onwards. Preliminary data from our different workshops and assignments both in our leadership programs and with our management teams and managers e.g. regarding change management clearly illustrates that we need to improve our skills in change management significantly. Improvement needs to be done both before, during and after different kind of changes. Especially the people side of change need to be improved. The same reasoning applies to our skills in communication-, goals-, efficiency, coaching, how we improve our work with our operation plan (top-down and bottom-up) and other related management and leadership skills as mentioned in the report 2007 that served as a foundation for Director General's decision 2008. For example our results from the two assignments where management teams and leaders estimates our organization's ability regarding change management gives you the numbers. The first assignment illustrates management and managers estimation about our organization's general ability regarding change management, see Results survey 1 below. The second assignment concerns their own ability regarding a specific change department managers are facing together with unit managers, see Results survey 2 below. The other examples and data in the rest of our organization show even more alarming figures than the numbers from this department illustrated below. The example shown here is also from a very ambitious department that are committed to improve their skills in change management. The outcomes will come sooner or later. With that mindset results will follow. That's also a fact.

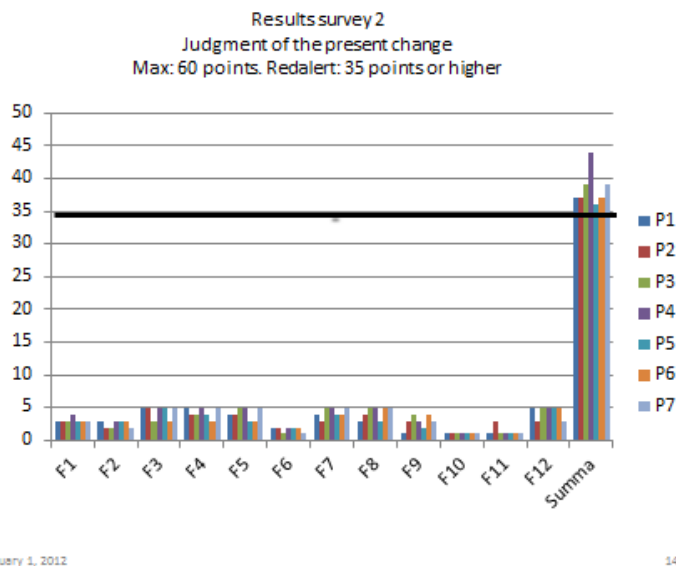
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Examples of questions (F1 to F12) for the diagram above are

- Are managers aware of the need for change?
- Are employees aware of the need for change?
- How have past changes been perceived by managers and employees?
- How much change going on in your organization?

The diagram illustrates the scores for each participants (here seven participants) on the 12 questions. On the right corner of the diagram the total sum is displayed for each question and person. This sum is the important one to start looking at. This sum should not exceed 35 points. A total sum over 35 points indicates red alert regarding managers skills in preparing, executing and follow-up changes.



Examples of questions (F1 to F12) for the diagram above concerns a specific change that an organization, department or unit is facing. The diagram

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illustrates the scores for each participants (here seven participants) on the 12 questions. On the right corner of the diagram the total sum is displayed for each question. This sum should not exceed 35 points. A total score over 35 points is red alert. That means that department and unit managers need to clarify why their specific change is needed, what the change really is about and what is achieved compared to doing nothing, how the change should be implemented, and what the benefits are for co-workers, managers, customers and other stakeholders if the change is carried through compared to other decision alternatives such as e.g. doing nothing at all. Similarly as diagram 1, the figures are even higher in the rest of our organization when it comes to different management teams and managers readiness for change. Our data clearly states that we need to increase our ability at all levels when it comes to how we prepare, carry through, follow-up changes. The same reasoning applies to other leadership skills.

Examples of questions are:

- What proportion of the organization is subject to change?
- How responsive is the organization for change?  
How good skills has management to lead change?
- How many employees are affected by the change?
- Does this change affect different groups in different ways?
- To what extent is the change about changes in work roles and responsibilities?

These examples gives our top management the numbers about our present state when it comes to this subskill of leadership. These and the other data we have accumulated so far also clearly supports the issues mentioned in the report 2007 and the vast amount of evaluations done by EFQM-experts, consultants since 2008.

#### **6.4.6 Business and leadership programs**

The extensive business and coaching programs, sometimes combined with mental training programs are, that explicitly are tailor-made for each individual manager is another example. The aim of evidence-based executive, business- and leadership coaching is sustained cognitive, emotional and behavioral changes that facilitate goal attainment and performance enhancement for managers, either in their profession, and/or personal life”

Business and leadership coaching translates into doing. Doing translates into impacting the business. This impact can be quantified and maximized. When studying effects of business and leadership coaching examples are numerous about its long-term effects compared to other leadership support.

*“How can you say that the sky is the limit, when there are footprints on the moon”*Paul Brandt

#### **6.4.7 Business and leadership studies outside our organization**

Examples from extensive studies such as e.g the extensive Manchester Review illustrates the costs in relations to benefits for organizations in both the public and

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private sector. A common challenge when studying the effects is related to measuring the intangibles. That means that shown outcomes are understatements. Another challenge is constructing experimental designs grounded in scientific principles that isolates the effects from in this case professional coaching from other effects, and to adjust for potential errors in estimation or to speak technically how to get more calibrated estimations. These factors could of course be calculated in different ways, but as long as you describe the basis for your calculations you can move forward and improve them. Doing something is always better than doing nothing under the condition that one describes what and how it has been done so other can criticize and hopefully make suggestions for constructive improvements.

*“To avoid criticism say nothing, do nothing, be nothing.” Aristotle*

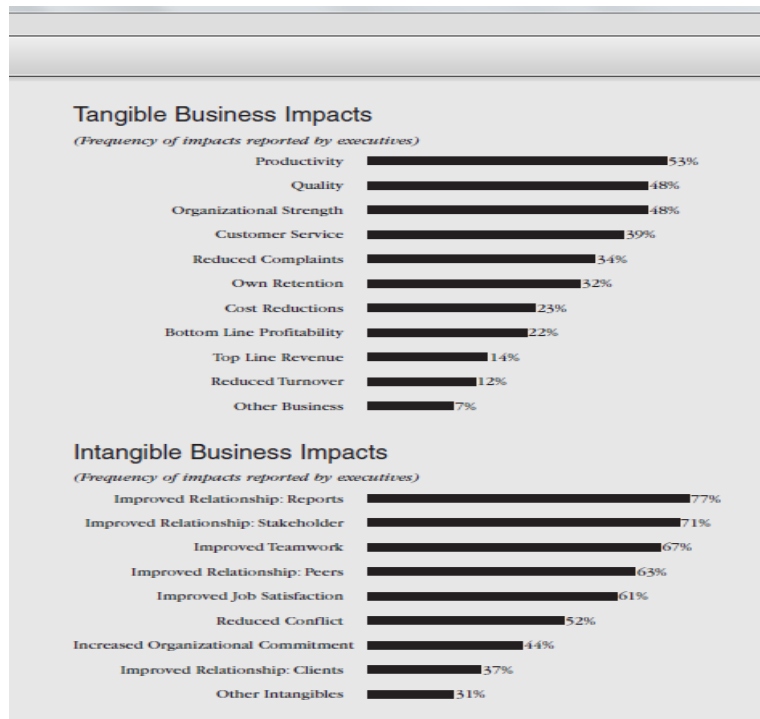
When studying the approaches for estimating the effects you can be confident that the models used are very conservative. That means that the effects shown by different studies are within the lower edge.

The ROI-figures when calculated according to these conservative models averaged nearly at 6 to 1 times the initial investment. That means that an organization at least get six dollars for every dollar invested in business and leadership coaching. In other words, a pretty good investment.

Most other studies indicates much higher effects. These studies also highlights different type of reactions, learning and applications and show that 86 percent of managers who received business and leadership coaching, and 74 percent of stakeholders were very to extremely satisfied with business and leadership coaching.

When it comes to learning, studies indicates great effects such as enhancing management and leadership skills, fostering personal growth, self-development, enhancing inter-personal skills and business agility etc. The same effects could be shown when it comes to applications or what the managers are doing differently after the business and leadership program that they otherwise not have done without the coaching, and reaching challenging long- and short term goals in different areas etc. An overview of effects is shown in the figure below.

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**6.4.8 Business and leadership coaching in our organization**

The design for cost and benefit calculations that are included in some of our business and leadership coaching program are more robust than the above calculations. It builds on previous research in experimental designs, AIE, operations research and other areas. The aim is too incorporate better experimental designs, and statistical approaches to capture both the tangible and intangible effects with higher quality. The approaches are still under development. More on that in later versions of this paper.

Our support within this area aims to includes cost/benefit analysis that captures the outcomes in more reliable and valid ways. More and better such cost and benefit analysis will be done both for this and other clients.

Example of results from one of our business and leadership coaching program that incorporates such cost/benefits calculations are given below.

The benefits compared to the costs are very favorable for our organization under all circumstances. The impact on business so far for one managers that undertook a two year program are a direct value worth SEK 13 million for his operation. The isolation factor in this experimental design has been very conservative. The isolation factor is an estimate regarding how much of the original calculated value the manager believes is due to the program. Even if we imagine that this manager should be pressed even further to adjust the isolation factor a long way down the benefits exceeds the cost by far. I want to underscore that it is only the direct value that is estimated. The indirect value should not be neglected according to this manager. Examples of what he means by indirect value and that has not yet been

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quantified could best be illustrated by managers own words, see excerpt below which highlights five learning issues.

1. *I have learned how to create challenging visions and long and short term goals for myself, my teams as well as my business. The importance of them being aligned in such a way that they inspires me to act and create successful results. For the first time, I have learned how to measure all of my goals with high quality*
2. *I have gained skills and personal traits that successful leaders in excellent organizations have put into practice well.*
3. *I have learned what drives, and challenges me, as well as what my fears and “blind spots” are ; and above all, how to build on my strengths and correct my weaknesses in order to become a much better leader.*
4. *I advanced my skills in how to develop groups into high performing teams.*
5. *I use the mental training I've learned to achieve goals with less effort, increase mental strength, and to cope with stress; applying crucial life skills to perform and feel better in all aspects.*

Besides an estimation of direct effects in his businesss, a ROI- model for quantifying the indirect effects or the intangibles above with high quality is under development and not yet ready for presentation for statisticians. Some statisticians says it can not be done with high quality. In my opinion (I am also a statistician) that´s wrong and will be shown in a future paper.

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#### **6.4.9 Management guidance/tutorial**

We also offer management guidance which usually consists of six groups with five managers in each group that meet three to four times per year under the direction of an experienced consultant. The main purpose is to strengthen the network between managers within our organization, to discuss current management questions and to get support both from the consultant and other managers in how to solve different issues.

The evaluation shows that our managers are very satisfied with this support and the consultant. The management guidance has been executed with good exchange of experiences as e.g. processes for wage-appraisals discussions in the autumn etc. The managers also experience the guidance as a “breathing space”, with opportunities to give each other tips and advice in their everyday work.

Suggestions for improvement concerns e.g. more thematic discussions for every session and to include more of the educations in our management and long-term support. They would also see a more holistic program in future guidance.

The majority of managers want to continue with this support the next year.

## 7 Recommendations

### 7.1.1 Improvements of our programs and support

Continious and never ending improvement in any area is always a moving target. If good can be better – then good is not good enough. We have identified the following improvement areas

- our process for carrying out these programs could be done even more efficiently in the future e.g. that more personel at our department get involved both in administration, educations and other areas.
- the order in different sessions especially for new managers should also be considered in future programs. More information is however required upon final decision.
- the sessions on steer and control should be extended in future sessions for new managers. It is such an important area especially for new managers that probably two days should be delivered in future programs.
- some venues regarding the sessions on coaching leadership should be checked regarding its suitability for the trainings.

### 7.1.2 Improvement relevant for our organization

Four issues are especially important in order to improve and accelerate our future journey towards excellence. First, our top-management team still has some work to do e.g. when it comes to clarify the change within the organization. A workshop is needed to increase top-management's awareness even further both to breadth and depth about the connections between our management system for quality, our leadership profile for managers and our core process and the content of our support and their responsibilities as department managers. Furthermore, a more formal decision by our Director General is needed to clarify the expectations on our managers even further when it comes to both management and leadership skills according to our leadership profile for managers. That's a fact. Our programs and long-term support to our managers gives a very solid foundation to make such a decision. Only the ambitious levels need to be clarified and discussed. Likewise, top-management needs to decide and clarify issues regarding efficiency and effectiveness related to our managers work situation such as clear guidelines for meetings and other waste already identified by the approaches and data so far in our support. The awareness of our recruitment- and decision process and its relationship to our leadership profile for managers need to increase significantly within our organization.

Second, more approaches, methods and data are necessary in order to measure the long-term effects of our management support according to level four above. This also applies to the cost-benefit ratio or ROI-methods.

Third, our existing managers need to prioritize competence development even further to meet the demands in our leadership profile for managers, but also future demands facing all authorities as e.g. to increase productivity, efficiency and effectiveness. A more strategic competence development between department and unit managers is highly related to all the issues mentioned above and in this report. Fourth, our managers need further support from the HR-department.

*“Failure is not the worst thing in the world, The very worst is not to try”*



Martin Lagerström  
Executive coach  
Personnel Department

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## Appendix – More about the author

### Achievements

- Excellent and measurable outcomes to different managers, leaders, co-workers, groups and teams, operations in private and public sector during the last 15 years
- My clients are better to tell what they have achieved in definite terms, see e.g. [www.linkedin.com](http://www.linkedin.com)

### Experience

- 16 years of managerial experience in the public sector – 10 years as a head at Statistics Sweden & 6 years as an executive coach
- 6 years of experience in the private sector as a management consultant to various managers, leaders, management teams etc.
- Over 15 years experience representing Sweden in international/national advisory-, experts, management and strategy groups as e.g. OECD, EU, UNWTO mm

### Certifications

- Certified Business, Management and Leadership coach
- Certified ICC International Executive Coach (ICC International Coach + ICC Team & Leader)
- Certified & Licensed Mental Trainer Practitioner/Mental Training Master (4 000 hours education)
- Certified DiSC Personality Profiles,
- Certified DiSC Coaching,
- Certified DiSC Group-and Team
- Certified DiSC Innovation & Teambuilding
- Certified Change Management, ADKAR/Prosci
- Diploma Business Intelligence
- Diploma Speed Reading, Learning & Memory
- Diploma e-learning Lectora Inspire & Camtesia

### Self studies

- Extensive self-studies with respect to excellence models in many different subject domains . All applied with successful outcomes for different managers, leaders, businesses etc. Examples of subject domains. personal achievements, business & executive coaching, management, leadership, cognitive psychology, sports psychology (peak performance), TQM, personal development, , mental-, emotional and spiritual training, applied statistics, speed reading, learning and memory etc.

### University degrees

- Three University Degrees, Stockholm University with excellent grades
  - Degree of Bachelor of Science with a major in Statistics.
  - Degree of Bachelor of Science with a major in Business Administration.
  - Degree of Bachelor of Science with a major in Psychology.

### Other

- Elite sports e.g. won the Swedish championship in badminton and belonged to the Swedish youth and junior national team for several years. .