LMW Leadership & Management Wales

Informing, guiding, advising

Leadership and management development – is it worth it?

An investigation into how businesses in Wales assess the return on investment of leadership and management training.

ESF

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Welsh Government

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About LMW

Leadership & Management Wales is part of the Enhancing Leadership and Management Skills (ELMS) programme. ELMS is part-funded by the European Social Fund through the Welsh Government.

LMW was formed to support businesses in developing their leadership and management development (LMD) skills, enabling them to increase efficiency and help grow the economy in Wales.

We work throughout Wales to provide a level of geographic coverage which ensures comprehensive knowledge and understanding of LMD activity, including regional distinctions, across the country.

Our vision

To create an environment where every business in Wales is aware of, understands, engages with and can benefit from leadership and management development (LMD).

We work throughout Wales to provide a level of geographic coverage which ensures comprehensive knowledge and understanding of LMD activity, including regional distinctions, across the country.

We will achieve our vision through four aims:

1. Raising awareness of the benefits of LMD, explaining and promoting LMD in ways which are appropriate and meaningful to businesses of all sizes and in all sectors;
2. Positioning LMW as Wales' one-stop shop for all LMD information and resource;
3. Providing evidence of the impact of LMD on individual businesses and the economy more widely;
4. Making the LMD in Wales the best it can be.

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Foreword

Dr Barrie Kennard

Director,
Leadership & Management Wales

There is a wealth of evidence from around the world to show that investing in leadership and management development reaps huge benefits for individuals, organisations and ultimately for the wider economy too.

However, there has been little research in Wales to pin down the real impact of training and development – the return on investment (ROI) – for businesses here.

This research examines the evidence from a range of organisations throughout Wales, which have undertaken LMD, and presents case studies which show how developing leadership and management skills can pay dividends for everyone involved.

Measuring ROI has always been a challenge, and the study finds that, although most businesses do set objectives for their LMD, these are not usually measurable. Instead they tend to hope LMD will improve key business performance indicators. Very often they find there is indeed a positive impact on the organisation.

This is an important piece of research, which will demonstrate to companies of all shapes and sizes the real benefits of investing in LMD.

Dr Barrie Kennard

The author

Ruth Wootton

Managing Director,
Momentwm Consulting Ltd

Following a successful and varied career within the financial services industry, Ruth founded Momentwm Consulting to enable her to focus on her passion for helping businesses, teams and individuals achieve their potential.

Drawing on more than 20 years' leadership experience in a diverse range of senior management roles, she now provides a unique blend of business support, performance coaching and mentoring to organisations and individuals facing challenge and change. She has a particular interest in the areas of leadership and management, personal skills development, project and change management.

Ruth holds a post-graduate qualification in strategic leadership, is a qualified executive coach and mentor and a PRINCE2® Practitioner. She is also a Fellow of both the Chartered Management Institute and the Institute of Leadership and Management.

Ruth Wooton

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Executive summary

This report investigates the return on investment of leadership and management development (LMD) interventions already measured by Welsh businesses.

Its two main aims are:

- To gain some evidence in order to communicate the value of measuring ROI to business in Wales.
- To develop case studies from Welsh businesses of mixed size, sector and geographical location within Wales.

Main findings

In the main, businesses do set objectives at the start of any development process. However, these tend to be broad and related to skills or behaviour, and do not have specific measures attached to them.

They do not tend to set specific business-related targets up front (although they do expect or hope that LMD will help improve all or some of their key business performance indicators).

While very few businesses formally evaluated the impact of any LMW or calculated the return on investment of that training, there was recognition and strong evidence of significant and positive impacts on both business performance and bottom-line results on reflection.

From the 10 case study businesses:

- 80% could evidence that business performance indicators had improved;
- 60% could quantify monetary savings that they attributed wholly or partly to the LMD intervention;
- 70% could quantify business growth that they attributed wholly or partly to the LMD intervention.
- Of the 33 businesses initially approached, 18 (55%) said they could attribute tangible business results and/or cost savings to LMD.

Main recommendations

1. **Businesses should formally evaluate training interventions in a way that works for them. Good methodical evaluation produces good reliable data.**
2. **When setting objectives for training, businesses (and training providers) should consider how they are going to effectively measure the achievement of those objectives.**
3. **Businesses should evaluate the training programme itself; how the learning is applied by individuals back in the work place and to what extent has it achieved a return on investment.**

Common areas of positive impact to business results attributed wholly or partly to the LMD intervention include:

- Growth of existing business – increased turnover and increased profits;
- Expansion of business – diversification into other business areas; opening additional arms of the existing business; purchasing larger premises;
- Increased sales;
- Taking on more staff to support business growth;
- Increased staff retention and associated recruitment and training savings;
- Improved processes and productivity and the cost savings linked to these;
- Improved absence management resulting in better attendance rates and the cost savings linked to this;
- Better people management/performance management and the cost savings linked to this.

Evaluations were generally limited to post-course questionnaires, verbal feedback and observations.

Evaluation of the business impact of LMD and any recognition of ROI tended to be noticed and appreciated over time, at which point most businesses could confidently link LMD to the improved business results.

In the one instance, where formal evaluation of ROI did take place, the business developed its own methodology.

Smaller businesses can more easily see and feel the impact of LMD and therefore are less inclined to spend time formally measuring it.

Smaller businesses also find it harder to set specific objectives for the training as they don't always know what they need to achieve and are driven by the need to simply learn more about leadership and management.

There seems to be some reluctance to set tangible business objectives and targets up front as the measurement of how a LMD intervention impacts these is seen to be difficult and open to questioning.

All businesses continue to invest in leadership and management training and development, although in most cases this is subject to continued funding.

4 When planning training or development businesses should start with the end in mind and have clearly defined specific and measurable objectives such as:

- **What is the desired outcome of the programme?**
- **What does success look like?**
- **What are the business metrics that we want to see impacted by this piece of work?**

5 Training providers and businesses to work together utilising tools and materials to allow businesses to simplify the process of evaluation and ROI measurement.

Introduction

Businesses are more likely to invest in training and development if they are presented with tangible evidence of the benefits. It is important to measure the results and/or success of their investment to be able to understand if it has been worthwhile, and should know what return can be expected on such an investment.

This research draws on the leadership and management training and development already undertaken by a sample of Welsh businesses and the outcomes of the activity they undertook.

The sample interviewed were those who perceived that leadership and management training had been beneficial to their business. The case study interviews were based on Kirkpatrick's Levels of Training Evaluations. (Kirkpatrick, 1959)

> "We are certain that it was worth the investment that we continue to invest significantly in leadership and management development."

Section 1

Research methodology

Leadership & Management Wales took a four stage approach to engaging with businesses across Wales for the research and data gathering:

- Short on-line survey
- Initial data-gathering interviews (telephone)
- In-depth employer interviews (face-to-face and telephone)
- Case study development

138
completed online surveys

32
telephone interviews

11
case studies produced from face-to-face interviews

Stakeholders

Informal interviews and information gathering was undertaken with the Welsh Government approved training providers and other external stakeholders.

Business size and category:

The organisations taking part in the survey and interviews came from a wide range of industries.

138 individuals completed the short on-line survey on behalf of their respective organisations. **Of these, the size of the organisations represented were as follows:**

- Micro - 46.4%
- Small - 18.8%
- Medium - 18.8%
- Large - 15.9%

32 individuals representing their respective businesses were interviewed. **The representation in terms of size and location was:**

- 1 x micro
- 10 x small
- 12 x medium
- 6 x large
- 3 x enterprise

Business location

- 19 x South Wales
- 9 x North Wales
- 4 x West Wales

11 case studies were created and published on the LMW website

Section 2

Summary of Findings

Reasons for undertaking leadership and management development:

Reasons for undertaking leadership and management development were very varied among the businesses interviewed. This is because the reasons given were vague and/or broad – e.g. "to learn more about how to run a business", "to give managers the knowledge and skills to operate effectively in their roles", "an opportunity presented itself, it was free so I took it." In all cases there was definitely enthusiasm for leadership and management training – businesses and organisations see it as adding value to their business and to their people. Specific reasons included:

- Not undertaken with a specific aim to improve business results;
- Tends to be based on a perceived need to improve skills and behaviours but generally without any specific or measurable outcomes in mind;
- In larger companies the need is driven by significant change or re-structure. Training is mapped to organisational strategy and plans but again objectives tend to be more skills / behaviour focused rather than seeking measurable improvements to tangible business performance results;
- A number of businesses have introduced LMD when they have recognised that promoting internally into management positions has meant that leadership and management skills are lacking;
- In smaller and medium sized businesses, it tends to be more about wanting to learn – knowing that they should know more but not knowing what that "more" is.

> "The bottom line is that none of this will be possible without dedicated and motivated staff who are willing to adapt and grow with the business and that is where effective leadership and management comes in."

Sourcing Training

Free or funded training was seen as vital and without this most of the businesses that undertook the training would not have done so. Obtaining a qualification as part of the package is seen as desirable by the vast majority. Offering a qualification seems to give more credibility to the training course and training provider.

A number of differences between larger and smaller businesses sourcing training were uncovered:

- Larger businesses tend to operate a mix of internal and external training, bringing in experts and tailoring open courses specifically for their business;
- Smaller businesses tend to look for external (and funded) offerings;
- Many smaller businesses attended training that they heard about via an e-mail or other mailings. As it was free or heavily funded they felt they had nothing to lose;

Objectives of Training

Objectives were wide-ranging and almost always linked to skills or behaviours.

A summary of the types of objectives include:

- Increase knowledge of leadership and management;
- Empower managers;
- Increase confidence levels;
- Encourage innovation;
- Consistency of practices across all business areas;
- Better people management / performance management / absence management;
- Change management;
- Developing a business strategy;
- Decision making and problem solving;
- Improving communication;
- Support culture changes;
- Laying the groundwork for the future;
- Give individuals a good all-round grounding in leadership and management;
- None / no preconceived ideas.

> “The Board are committed to the continued development of our people and have recognised the part leadership and management development has played in growing our business results.”

Objectives that linked to business performance results were few and far between and still often quite broad / wide-ranging:

- Improve business results;
- Improve employee survey results;
- Reduce the need to use expensive external consultants.

There was not one business which had set specific or measurable targets up front (business-linked or otherwise).

Evaluating the Training

The most widely used and popular model for the evaluation of training programmes is known as The Four Levels of Learning Evaluation. The model was defined in 1959 by Donald L. Kirkpatrick in a series of articles that appeared in the US Training and Development Journal. Kirkpatrick redefined the evaluation model with his 1998 book Evaluating Training Programs: The Four Levels.

The idea behind the model is for an organisation to have meaningful evaluation of learning in the organisation. The degree of difficulty increases as you move through the levels. However, the knowledge learned regarding the effectiveness of the training programme more than compensates for this.

Interviews with case study businesses explored this element in more depth and were based loosely on these steps with particular emphasis on the ROI element within Level 4 – Results.

> “It made me think about where I am now and opened my eyes to the possibilities”

Level 1 – Reaction:

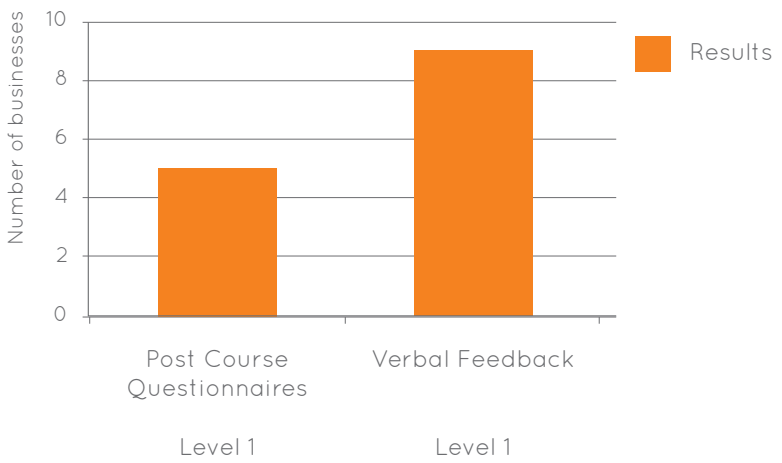
Reaction evaluation is how the delegates felt and their personal reaction to the training or learning experience.

50% of businesses stated that they used post-course questionnaires to evaluate a training intervention.

- External providers often provided the feedback forms at the end of a course, but businesses did not always see the results of these and so they were more for the training providers' benefit.
- Internal training was also evaluated using feedback forms but appeared to have limited value to anyone other than the training team who may use the feedback to improve future courses.
- Businesses were better able to talk about the verbal reactions of their people on returning to the course and this was almost unanimously positive with 9/10 businesses reporting high levels of good feedback. (It should be borne in mind that the researcher only interviewed companies that felt training had been beneficial)

> “A good measure of the value is to ask 'would I do it again?' and the answer is yes”

Level 1 Evaluations



Level 2 – Learning:

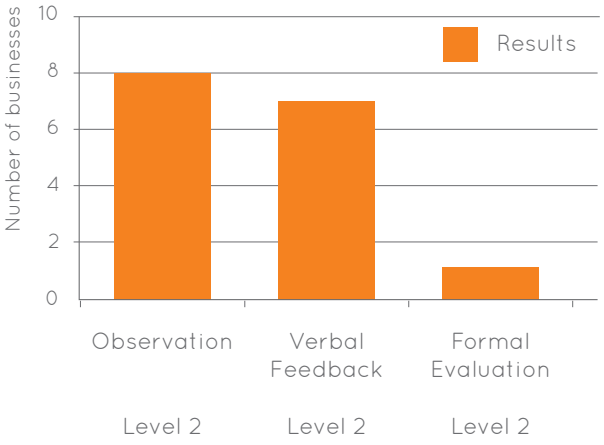
> “We are certain that it was worth the investment that we continue to invest significantly in leadership and management development”

Learning evaluation is the measurement of the increase in knowledge or intellectual capability from before to after the learning experience.

Generally businesses felt that delegates had learnt what was intended to be taught and often a great deal more, but were unable to evidence this in any meaningful way.

- The evaluation of this area tends to be based more on how an individual or their line manager feels their level of knowledge has increased;
- There were no formal assessments to check understanding;
- There were anecdotal instances of individuals applying their learning to situations or problems where previously they would have not been expected to be able to rise to the challenge.

Level 2 Evaluations



Level 3 – Behaviour:

> “Improvements were seen straight away as managers improved the way that they dealt with problems that were stealing their time and preventing them from doing their real jobs”

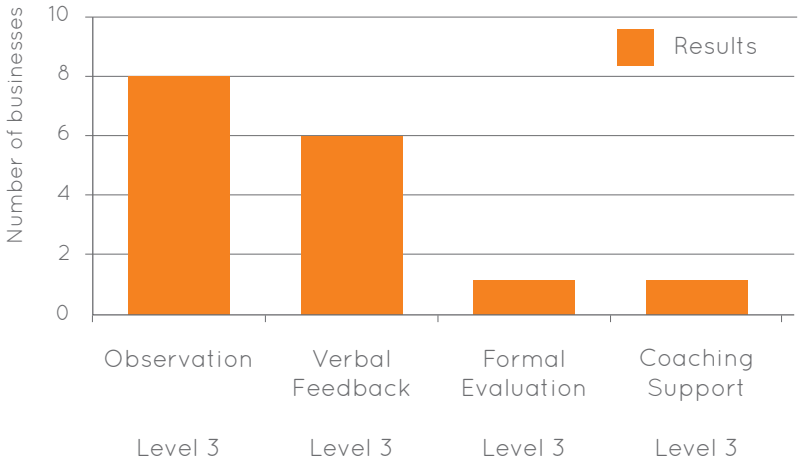
Behaviour evaluation is the extent to which trainees applied the learning and changed their behaviour. This can be immediately and several months after the training.

80% of businesses could articulate the changes that they had observed in their managers following LMD. **The common areas of improvement included:**

- Greater confidence in self;
- Improved ability to deal with/manage people;
- Improved problem solving skills;
- Greater ownership; taking more responsibility; more committed and involved;
- Self-motivated; positive;
- Improved performance management skills;
- Enhanced communication skills.

There were no formal, measurable evaluations to substantiate these observations, however all businesses interviewed were confident that significant behaviour changes have taken place as a result of LMD and that these have had a positive impact on their business.

Level 3 Evaluations



> “The bottom line is that none of this will be possible without dedicated and motivated staff who are willing to adapt and grow with the business and that is where effective leadership and management comes in”

Level 4 – Results:*

Results evaluation is the effect on the business or environment resulting from the improved performance of the trainee and may include the return on investment. In this instance ROI has been included in the Level 4 review.

***ROI** *Since Kirkpatrick established his original model, other theorists (for example Jack Phillips), and indeed Kirkpatrick himself, have referred to a possible fifth level, namely ROI (Return On Investment). ROI can easily be included in Kirkpatrick's original fourth level 'Results'. The inclusion and relevance of a fifth level is therefore arguably only relevant if the assessment of Return On Investment might otherwise be ignored or forgotten when referring simply to the 'Results' level.*

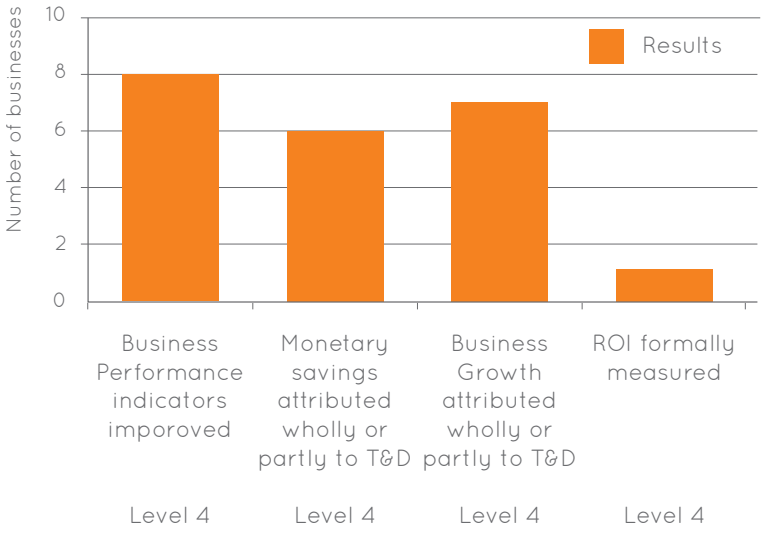
> “We have seen increases of up to 25% in revenue which we have directly attributed to their improved effectiveness as leaders.”

With one notable exception (more below), businesses did not plan to formally measure business results or ROI following the completion of LMD. They were, however, all able to confidently say that LMD had had a positive impact on their businesses on reflection.

Of those that could quantify business improvements:

- 80% could evidence that business performance indicators had improved;
- 60% could quantify monetary savings that they attributed wholly or partly to the LMD intervention;
- 70% could quantify business growth that they attributed wholly or partly to the LMD intervention;
- 10% formally measured the return on investment (in a way that worked for their business) and could quantify this.

Level 4 Evaluations



> “We have increased our turnover from £49,000 to over £1 million in less than seven years as well as increasing our workforce from 5 to providing jobs for nearly 90 local people.”

> “We’ve identified a saving of over 550 management days. At an average cost of £130 per day that equates to £71,500.”

Common areas of positive impact to business results attributed wholly or partly to the LMD intervention include:

- Growth of existing business – increased turnover and increased profits;
- Expansion of business – diversification into other business areas; opening additional arms of the existing business;
- Increased sales;
- Taking on more staff to support business growth;
- Increased staff retention and associated recruitment and training savings;
- Improved processes and productivity and the cost savings linked to these;
- Improved absence management resulting in better attendance rates and the cost savings linked to this;
- Better people management/performance management - cost savings attributed to this.

For small and medium sized businesses a significant benefit was the enhanced ability of business owners to step away from the day-to-day running of their businesses; delegate to others and have the time to focus on business strategy. Without this in place, it is unlikely that they would have seen such positive business growth.

The exception - Formal ROI calculation

One business did formally measure the ROI of their LMD intervention, which in this instance was provided in the form of one-to-one coaching for managers.

They planned from the start to measure the ROI and developed an in-house methodology that suited their purposes and that managers at all levels could buy into: As a result they are able to state that their ROI is an average of 5:29 ie. For every £5 spend they get a return of £29.

The method they have developed is simple but effective. Not only is it something that senior managers were able to accept as an indication of ROI, it also makes learners accountable by asking them to quantify their individual ROI.

They ask their managers to consider the top three skills or abilities that they have improved as a result of the coaching they received and to identify the one that has been of the most significant benefit in their current role. Next they ask them to show how this has enabled them to be more effective in the workplace and to convert their progress into £s.

Each of these ROI calculations is sanity-checked by the individual's line manager before being submitted and forming part of the overall measurement of the ROI for the programme.

> “It made me think about where I am now and opened my eyes to the possibilities.”

ROI EXAMPLE

Most significant Benefit:
Time Management

How has this enabled you to be more effective in the workplace?
A greater understanding of what was taking up my time helped me delegate more effectively and organise my time more efficiently.

Convert this benefit into £s:
Hours saved per week x 48 working weeks in the year x £16 = £3,072 saving of my time.

I have used this time to encourage, train and coach the engineering team and as a result mill delays and the engineering spend has been reduced by £30,000.

What percentage of this change was caused by or enabled as a result of your involvement in the coaching programme?
95% - £28,500

What confidence do you place on the above information (100% = Certainty; 0%= No Confidence)?
100%

Conclusions

- Leadership and management development does have a positive impact on business results.
- Businesses are able to quantify improved business results and / or cost savings after the LMD intervention and able to say whether they believe they are wholly or partly attributed to that intervention.
- Businesses do not generally plan to formally measure the impact of LMD interventions and rarely have any clear expectations of how they hope it will benefit their business.
- Businesses take time to decide what training support they need and to source suitable training to match their needs but they do not plan (or budget) to measure the impact of that training at any level.
- The evaluation process is often either verbal feedback or a simple questionnaire that provides immediate reaction data but does not look at the wider impact of the training intervention.
- Non-financial measures of ROI are still meaningful and powerful.
- It takes time and effort to formally calculate ROI and smaller businesses often feel that they can see and feel the impact of LMD without having to undertake any formal evaluation.
- Evaluating training and calculating ROI does not have to be overly complicated but it does need to be considered and planned at the beginning of the training and development process.

> “Developing our managers has created a strong platform for future competiveness and sustainability of the business.”

Recommendations

- Businesses should formally evaluate training interventions in a way that works for them. Good methodical evaluation produces good reliable data. Where little or no evaluation is performed, the effectiveness of the training will never be truly known.
- Businesses (and training providers) should consider how they are going to effectively measure achievement when setting objectives.
- Evaluate the training programme itself; how the learning is applied by individuals back in the work place and to what extent it has achieved a return on investment.
- Plan for training evaluations at the same time training objectives are set and training is being sourced.
- Start with the end in mind - have clearly defined, specific and measurable objectives.
  - What is the desired outcome of the programme?
  - What does success look like?
  - What are the business metrics that we want to see impacted by this piece of work?
- Make evaluation a key and integral part of the training and development process – develop your own process that suits the needs of your business.
- Include all stakeholders in the evaluation process, e.g. senior management, the trainer, line management and the trainee.
- Individual participants of the programme should take their share of responsibility for providing evidence to support the investment in them.
- One size does not fit all – any training evaluation and measurement of ROI needs to fit the aims of the programme and the needs of the business.
- Training providers and businesses to work together utilising tools and materials to allow businesses to simplify the process of evaluation and ROI measurement.

> “Improvements were seen straight away as managers improved the way that they dealt with problems that were stealing their time and preventing them for doing their real jobs.”

Section 3

Case Studies

Name:

Cardiff YMCA

Description:

City Centre housing projects and support services

Location:

Cardiff

Employees:

72

> “Our board believe that if our managers are good, the rest of the team will absorb the good practice, feel valued in their work and stay with us.”

Corina Churchlow,
Operational Manager

Why did you decide to undertake leadership and management training?

As a result of a new funding stream in 2004, our organisation almost doubled in size. As a result of the sudden increase in staff we introduced a new management level across all of the departments.

We wanted to ensure that our managers were skilled in the art of leadership, confident in managing people and able to motivate teams to deliver good services.

Our managers were all very enthusiastic about the opportunity to gain a recognised management qualification.

What training took place?

We decided to train existing and potential managers and commissioned an external company to run a modular ILM Management course that would be delivered in-house over an eight-month period.

Since then we have repeated the course every 12-18 months for staff who are new to a management role or those who aspire to be managers.

We have expanded the remit of the course to include consistent management practices and enhanced communication as well as including more real work based projects as part of the learning.

We also commission one-off workshops on key topics that affect our managers such as coaching, chairing meetings and handling disciplinaries which keeps up the momentum of continuous learning as well as bringing the wider team together.

What have been the key benefits?

Teamwork has improved and the different departments work well together which aids the smooth running of the business.

As a result of the open culture that has been built, staff feel more able to voice ideas and/or concerns to their line managers.

Our managers are more confident dealing with people and more able to handle issues that arise.

How have you measured the value or return on investment (ROI) of the leadership and management training?

We carry out a formal evaluation and include in this, examples of things changed or initiated as a result of the training. We also ask line managers what changes and improvements they have seen.

Some of the changes initiated by individuals have a monetary value attributed to them, while others add value by improving elements of process or service.

Of the 36 managers we have trained over the years, 19 have been promoted since attending the course, four of those to senior management positions. Staff retention is positive and we have a less than average sickness record. We use a "happy score" system to measure staff morale on a score of 1-10 and 63% scored eight or above.

Why should other businesses consider investing in leadership and management training and development?

It's not a luxury, but rather offers a good return on investment. It makes sound business sense as well as offering individuals personal reward.

Name:

Celsa Manufacturing UK Limited

Description:

Manufacturer of steel reinforcement and other long steel products

Location:

Cardiff

Employees:

400+ (700+ including contracted services)

> "Developing our managers has created a strong platform for future competitiveness and sustainability of the business."

Robert Fleck,
Learning and Development Manager

Why did you decide to undertake leadership and management training?

Annual reviews indicated that the achievement of some of the business's core objectives were being hampered by the lack of competence and confidence of our managers at all levels. There were some specific gaps in skills and knowledge when it came to managing people and performance.

We were also conscious that we needed to begin succession planning to identify our managers and leaders of the future.

We had previously delivered in-house classroom-based training at ILM Level 2 for team leaders and an ILM Level 3 equivalent for middle managers, however following a review it became apparent that many of the issues we were trying to address were still present. As the original training predominately involved Celsa managers learning with Celsa managers, there was a danger that it was to "inward looking" and that we were simply reinforcing existing behaviours. We felt it was time for a different approach.

What development took place?

We implemented a wide-ranging coaching programme for our middle and senior managers which ran successfully from 2009 to 2012.

In order to help bring a fresh perspective to the business, we used both internal and external coaches from Celsa and Executive Edge Coaching respectively.

Each manager or coaching client was invited to an initial briefing session which encouraged them to think about how they could best utilise their coaching sessions. Next they attended a "kick off" meeting with their coach and line manager, followed by six-eight coaching sessions during which time they set goals and worked on achieving them.

At the end of the coaching sessions another joint "Review and Springboard" meeting was held with the client, their coach and line manager to ensure that the momentum was maintained.

During the programme, support was also provided in the form of peer support groups and workshops.

Over a three-year period over 80 managers have benefited from one-to-one coaching

What were the key objectives?

To deliver a sustainable and positive change in the way our middle and senior managers deal with the operational and people challenges facing them in the day-to-day running of their business.

Early in 2009 we identified five areas where we believed our people needed support and development in order for the business to run effectively:

— Assertiveness

— Improved communication skills

— Dealing with difficult people

— Developing stronger relationships

— Dealing with challenging behaviours

We wanted to challenge managers' perceptions of their role and behaviour and hold them to account on delivering the actions they committed to through the use of a coaching approach.

How have you measured the value or return on investment (ROI) of the leadership and management training?

We evolved the way we measured the ROI as the programme gathered pace and as a result we are now able to say that our ROI is an average of 5:29.

This means for every £5 invested in the leadership and management coaching development programme we are seeing a £29 return.

We ask our managers to consider the top three skills or abilities that they have improved as a result of the coaching they received and to identify the one that has been of the most significant benefit in their current role. Next we ask them to show how this has enabled them to be more effective in the workplace and to convert their progress into £s.

ROI EXAMPLE

Most significant Benefit:
Time management

How has this enabled you to be more effective in the workplace:
A greater understanding of what was taking up my time helped me delegate more effectively and organise my time more efficiently.

Convert this benefit into £s:
3 hours per week x 48 working weeks in the year x £16 = £3072 saving of my time.

I have used this time to encourage, train and coach the engineering team and as a result mill delays and the engineering spend has been reduced by £30,000.

The final sanity check asks what percentage of this change the client believes was caused, or enabled by the coaching and what level of confidence do they have in the benefit calculation they have provided.

In the above example this sanity check reduced the overall saving to £28,000.

Each of these ROI calculations is reviewed by the individual's line manager before being submitted and forming part of our overall measurement of the ROI for the programme.

In addition, as the coaching process progresses, we take "value ratings" on a simple 1 to 5 rating system measuring:

— The client's rating of the value gained from coaching

— The coach's rating of the client's engagement in the process

— The client's rating of their line manager's support to the coaching process

Why should other businesses consider investing in leadership and management training and development?

People who have worked well with a coach develop greater awareness of self and their impact on others, They show a willingness and ability to build excellent working relationships with people which in turn creates a strong platform for future change, development and growth of the business.

Name:

DMM Wales

Description:

Manufacturers of Safety Critical Climbing & Working at Height

Location:

Llanberis; North Wales

Employees:

136

Why did you decide to undertake leadership and management training?

To be honest it wasn't something I chose to do initially. I found myself in a new role having been promoted from the shop floor and was told I was being sent on some training to improve my knowledge and confidence.

What training took place?

I completed an Operational Management programme with Awberry Management and the University of Derby.

It ran for a period of seven months and I gained a Level 7 NVQ qualification and part one of an MBA.

We are currently putting all our managers through an HR for Managers course to help them develop their skills in managing people and it is receiving really positive feedback.

What have been the key benefits?

The main areas of focus for me were around time management and in particular maximising the productivity of our teams through better control of holidays, absences and clocking in and out.

I'm now actively involved in driving a positive change in culture, particularly around absenteeism and wellbeing. I undertook a review of our attendance levels, the cost of absenteeism to the business and the cost of the reduced production output.

I presented my findings and recommendations to the Board of Directors and was given the go-ahead to make some significant changes to the way we did things.

I have introduced much more reliable and effective performance management techniques that give us much better visibility of resource utilisation and cost implications. I also undertake back-to-work interviews for staff across the business.

Undertaking this course taught me that the leadership theories and models are there for a reason and if used properly have a positive impact. Things don't just change or improve all by themselves.

> "Leadership and management development is a key part of setting the groundwork for change and growth."

Alex Winton-Roberts,
Operational Manager

From a personal perspective I have an increased level of knowledge and so am able to interact with my colleagues up to director level in a much more professional manner. I have the confidence to voice my opinions and can articulate my reasons for agreeing or disagreeing with a course of action.

How have you measured the value or return on investment (ROI) of the leadership and management training?

Whilst we can't possibly attribute all of the business successes to attending leadership and management training I believe that it has had a significant part to play in the positive results we have seen in recent years.

Turnover has grown from £6.274m in 2008 to £8.3m in 2012.

We are aiming to reach a turnover of £25m and employ another 100 staff in the next 10 years and have made significant investments in premises and plant and machinery to help facilitate this.

The bottom line is that none this of will be possible without dedicated and motivated staff who are willing to adapt and grow with the business and that is where effective leadership and management comes in.

Why should other businesses consider investing in leadership and management training and development?

Absenteeism can have a significant and negative impact on a small business. Learning how to effectively manage attendance not only addresses this but has other far-reaching beneficial effects in the business and ultimately a positive impact on your employees.

Attending any type of leadership and management training lays the groundwork for success but it is up to you how you then build upon it in your business.

Name:

Me:Me and MAN

Description:

Female Beauty Clinic and Barbers

Location:

Maesteg, South Wales

Employees:

14

Why did you decide to undertake leadership and management training?

I knew I wanted to grow the business but I didn't really know how. My wife and I were heavily involved with the day-to-day running and activities of the business which left us little time to make plans for the business.

We received an e-mail from Excelsior Plus offering training. We felt that not only would it be good for our staff to gain professional qualifications, it would also benefit the business. Although we didn't know at that stage exactly what we needed Excelsior was offering the training free of charge and so it was something we couldn't afford to miss out on.

We talked with our staff beforehand and involved them in deciding what training would be best suited to both the business needs and to their individual needs.

What training took place?

Two of our managers did an ILM Level 4 Leadership and Management qualification and another team member did an NVQ in Customer Service.

The qualifications took approximately one year to complete and our NVQ assessor came to the salon at least once a month to support us.

Although I didn't take the training myself, I've learnt a lot both from the salon managers and from our excellent NVQ Assessor Sarah Parsons who has ensured that I am able to support my managers as they have learnt and grown in their roles.

One of the most positive changes for me came about when Sarah banned me from speaking to my staff about work-related issues. She told me that I had to deal with the managers and not by-pass them. It taught me that they were perfectly capable of running the salons without me needing to be there all the time.

What have been the key benefits?

To start with, leaving the day-to-day running of the salons to the managers was very scary, however I soon realised that not only could they do a great job, I also now had enough time on my hands to start looking at ways I could grow and develop the business. It's allowed me time to get more creative and find new ways to move the business forward.

> "We've doubled our turnover, taken on six more staff and also started another new business."

Warren Videan,
Owner and Managing Director

We've been able to introduce new systems and new customer services that have really helped our businesses thrive. A new, interactive website and the use of social media has helped widen our reach and our new 24-hour online booking service has been a big hit with our clients.

I have a much better handle on the business's cashflow and turnover and so am in a much stronger position when it comes to making decisions about buying new equipment or taking on new staff. We have employed a book-keeper and HR support which again frees my time to focus on business growth.

Most importantly I have complete faith and trust in my managers and am happy to allow them to run our salons in the way that they see fit. They have a significant input into how we drive the business forward, particularly in areas such as customer service and marketing. We meet regularly, make joint decisions and make a special effort to ensure that the lines of communication are always kept open.

Having seen the benefits of training, we now set aside a budget each year for training and have continued to develop our staff. I believe that in giving my team opportunities for development they value their jobs more and are more motivated which in turn supports me as the business owner.

How have you measured the value or return on investment (ROI) of the leadership and management training?

If our managers had not undertaken this training, I would not have been able to step back from the business and plan for its future, and the ability to do so has had a huge impact.

Since beginning the training we have maintained our turnover for Me:Me, doubled our turnover for MAN and taken on six new staff. We're really proud to have done all this during a period of recession.

We've also expanded into other business areas and have just opened a new business which we wouldn't have been able to do if I was still so heavily involved in the day-to-day running of the business.

If I had to put a pounds-and-pence figure on the return on investment we have had from the leadership and management training that we undertook, it will be the future profits of this business.

Why should other businesses consider investing in leadership and management training and development?

From a staff perspective, it's easy as a small business owner to forget that they too have dreams, ambitions and aspirations. Investing in leadership and management training for your people not only enables them to develop individually but also brings significant benefits to your business.

I know my business much better now and I'm driving it rather than it driving me which makes owning and running a business a much more pleasurable and rewarding experience.

Name:

Michael Phillips Care Agency

Description:

Domiciliary Home Care Services

Location:

Rhyl; North Wales

Employees:

88

Why did you decide to undertake leadership and management training?

Nobody is born with the requirements to develop a business; it's a skill that needs to be learnt. I knew that in order to develop my business and employees successfully I needed to have a strong personal knowledge and skills base from which to work from.

With the foundation already in place (by this I mean the ambition, determination, vision, guts and ability to think outside the box) leadership and management development was the missing link on my route to success.

I needed to acquire the skills to motivate and develop others around me to be more productive achievers whilst simultaneously focusing on my own development as a business leader.

What training took place?

As well as a number of industry-specific qualifications I completed a programme in Essential Leadership with Learning to Inspire. More recently I completed the Lead Wales programme with Bangor University.

Since then each of my five senior managers have completed leadership and management training relevant to their individual needs. One is currently doing a Management and Business Administration degree.

I encourage my team to choose the training that they think is going to be of most use to them as I believe that this increases their commitment to the learning process.

What have been the key benefits?

From a personal point of view I find that I am much better equipped to deal with the everyday stresses of running a business and this has a positive impact on those around me. I am able to more effectively communicate my vision to everyone in the team and so that it has become a vision we all share and aspire to.

By encouraging those working for me to think for themselves and become independent from me, I have freed up my time to concentrate on growing and improving the business.

> "In 2001 I was a carer and administration clerk. Now I am the MD and co-owner of the business."

Karen Hughes,
Managing Director

Within the rest of the team we have seen a marked improvement in teamwork, communication and motivation and this is particularly evident in the open relationship between staff and management.

How have you measured the value or return on investment (ROI) of the leadership and management training?

We haven't done a formal calculation as such, but our business has expanded and thrived at a tremendous rate.

We have increased our turnover from £49,000 to over £1 million in less than seven years as well as increasing our workforce from five to providing jobs for nearly 90 local people.

We recently opened a second day care centre which offers support to people regardless of their age or disability. This has been a dream of mine for years, but the Lead Wales programme gave me the kick to actually do it.

Why should other businesses consider investing in leadership and management training and development?

I joined the business in January 2001 with the help of Scopes Fastrack Programme. I was a carer and administration clerk. Today I am the co-owner and MD of the business and have a number of awards to mark my achievements.

The rest of my senior team also started as care staff, and through personal development and training have risen to be highly respected in the positions that they hold today.

I have a dedicated, trustworthy and ambitious management team working with me but without the investment in training and development we simply would not have achieved the success and level of business growth we have experienced.

Our success is purely down to the on-going training and development of everyone at Michael Phillips Care Agency. The leadership and management training we have invested in has played a huge part in this success and has been well worth the investment.

Name:

Pinacl Solutions UK Limited

Description:

A managed service provider which delivers technology solutions for converged IP-based voice, video and data networks.

Location:

St Asaph, North Wales

Employees:

30 at St Asaph (105 UK-wide)

Why did you decide to undertake leadership and management training?

We have often promoted technical people into supervisory or management roles because they are good at their jobs, which can create both positive and negatives in terms of leadership capability within the organisation. We have been an Investors in People accredited organisation for a number of years and during one of our assessments it was suggested that we may benefit from defining what a Pinacl Manager looks like.

We met with Learning to Inspire and found that Kouzes Posners Leadership Principals were perfect for our organisation.

What training took place?

In conjunction with Learning to Inspire, we designed and delivered a 10-month in-house Art of Leadership Development programme. Twenty three managers from across the UK came to Wales for a one day a month during the course of the programme.

A separate event was held for our directors who were also supported with executive coaching sessions.

We also ran a half-day workshop for all our employees to share with them the reasons we were investing in our leaders and what part they can play in the future of the business.

Managers are supported through an on-going coaching programme that we use to encourage and challenge individuals to be the best that they can be.

> “We have seen increases of up to 25% in revenue which we have directly attributed to their improved effectiveness as leaders.”

Susan Davies,
HR Director

What have been the key benefits?

As well as developing our managers, it has created a positive cultural change within the organisation which has enabled us to move the business forward. Having all our managers on the same modules has definitely helped with consistency and communication and as a result the company feels like it is working more as a team.

Managers learnt about making brave decisions as well as understanding the expectations we had of them in terms of implementing the learning and role-modelling the right behaviours. At the end of each module they had to do something within the business to show what they had learnt and how this had positively impacted the business. This was shared and reviewed at the next module session.

We were delighted to see a marked improvement in performance following completion of the programme and in addition our managers reported that they felt more valued and engaged.

Embedding these leadership principals within our organisation has given us a common language and understanding from which we can all operate and which we now use as part of our appraisal process. We encourage all our people, not just the managers, to become change champions, understand the part they play and continually look for ways to improve our processes and grow the business.

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How have you measured the value or return on investment (ROI) of the leadership and management training?

This was a big investment for us and has been a resounding success. There are many different ways that we have measured the value of this intervention and these are some of the more tangible highlights:

- Across our various customer sites we have seen increases of up to 25% in revenue which we have directly attributed to their improved effectiveness as leaders.
- We set some very challenging business growth targets for the last year and at the time of writing we had achieved a 30% increase in profit from the previous financial year.
- One of the managers who stood out whilst attending the programme has since been promoted and is now the Service Delivery Director
- Absence rates have improved significantly and we had two consecutive months where we had no absences at all.

It feels really good within the organisation now. The board are committed to the continued development of our people and have recognised the part leadership development has played delivering in growing our business results.

Why should other businesses consider investing in leadership and management training and development?

Developing your managers and leaders is all about empowering them and their staff to work together for the greater good of the business. It encourages goal setting, focus of efforts and creates a more positive culture which in turn helps your business to flourish.

If we had not invested in this development programme it is highly unlikely we would have seen the same level of business growth we have experienced in the last year.

Name:

The Wallich

Description:

Homeless charity

Location:

Cardiff, South Wales

Employees:

234

> “ Managers often get forgotten about, We’ve invested in them and the results speak for themselves. ”

Heidi Morris,
Human Resources Business Partner

Why did you decide to undertake leadership and management training?

It was part of an on-going plan for staff and management development. Whilst we have a very comprehensive training programme for front line staff, analysis showed that there was not enough management development taking place.

Managers had been appointed, based on their skills and knowledge about the day to day work but we’d not given them sufficient training to lead and manage people and teams.

We realised that in order to drive positive change in the business we needed to invest in developing both our new and existing managers.

Our aim was to drive a change in culture and create empowered managers that were more able to use their initiative and look for solutions to problems and challenges.

What training took place?

Working with Consult Capital and using our internal training resources we developed a programme of training events that covered a raft of people management skills including Performance Management and Dealing with Grievances and Disciplinaries.

Over 30 of our managers in roles as diverse as finance, property and project management attended the courses. Feedback was excellent – managers told us it was very helpful and that it made things much clearer.

What have been the key benefits?

It's been really successful – our managers are all on board, they understand why we are driving changes to the culture of the organisation and are embracing change and helping us move forward.

Improvements were seen straight away as managers improved the way that they dealt with problems that were stealing their time and preventing them from doing their real jobs. They became much more confident and able to deal with performance related issues that had previously been ignored or accepted.

This has been a really positive benefit and we are able to verify this through the significant improvements in our staff satisfaction survey results.

How have you measured the value or return on investment (ROI) of the leadership and management training?

Whilst we've not done a formal review of return on investment, we've seen some quantifiable time savings as our process times and resource requirements in areas that we classed as "time stealers" have improved.

We've identified a saving of over 550 management days. At an average cost of £130 per day this equates to £71,500. Given that our total outlay for the training was less than £5,000, I'd say that we can safely say that the training has added value!

More importantly it allows our managers to use their time to focus on the business.

We are so sure that investing in training is the right thing to do that we are currently in the process of creating a portfolio to show what training managers need at the various stages of their careers. We also offer ILM level 5 and 7 Leadership and Management training to managers who want to gain professional qualifications.

Why should other businesses consider investing in leadership and management training and development?

Managers often get forgotten about, We've invested in them and the business results speak for themselves

WATERS CREATIVE
STRATEGY & VISION

Name:

Waters Creative

Description:

Design and Marketing Studio

Location:

Swansea; South Wales

Employees:

10

> “I ask myself all of the time – was that a good use of my time or could I have been doing something more worthwhile?”

Rachel Wheatly,
Co-Director

> “It wasn’t a training course – it was a business overhaul!”

Rhian Hullin,
Co-Director

Why did you decide to undertake leadership and management training?

Rachel: I always want to learn and develop. I heard about the Lead Wales programme and it seemed to have the right balance of time, cost (it was free) and practical application. I also knew some people who had already attended and had heard really good things about the programme.

Rhian: As Rachel went through the programme I saw her grow in confidence and standing back and looking at the business in a different way. She was able to communicate her ideas in a much clearer way to me andthe team. It was exciting to see and so obviously I wanted to do the course too.

What training took place?

We went on the Lead Wales programme with Swansea University. It was one day a fortnight over a period of eight months.

We both had very different, but very positive experiences. Rhian found the coaching element a fantastic source of support whilst Rachel found the shadowing element very hard but extremely valuable.

The programme was very practical and gave us the opportunity to work on our business rather than in our business.

What have been the key benefits?

We realised that we actually complement one another very well – Rachel is very creative and Rhian is good at managing people so we are able to make sure we are playing to our strengths.

We are more focused on what we are doing and meet outside of the office regularly to look at where we are and what we are doing. During these meetings we ask ourselves one key question, we review our business plan and progress, we look at what we are good at as well as what we are not so good at and we identify our time suckers. This is a hugely valuable process – opening our second office in Reading came out of one of these meetings held on Christmas Eve!

We are better at nurturing and developing our people and have worked very hard to build our team and create a culture of creativity and equality. Our team is vital to the businesses success and so it’s important that they are on board and know what we are aiming to achieve and so we make sure that they always know what is going on.

We now run "inspiration sessions" with our team where we ask teams to contribute their ideas and help us set the general direction and growth of the business.

It's given us both a massive confidence boost. We're much more proactive and very proud of what we do and more importantly, we're able to articulate that pride in a way that helps us grow and develop the business.

How have you measured the value or return on investment (ROI) of the leadership and management training?

In the last 12 months we have increased our turnover by nearly 10%, the majority of which we attribute to having attended the Lead Wales programme and implementing the things we learnt there.

We have also just opened a second office in Reading and we aim to grab a share of the lucrative London market. Whilst we may have done that sometime in the future, Lead Wales gave us the confidence to go for it now.

Why should other businesses consider investing in leadership and management training and development?

It was great to be challenged about our business. As an owner no-one ever challenges you and it is something all small business owners would benefit greatly from.

To be honest, at times the experience was sometimes painful but we took everything on board and made lots of changes to our business which has helped us grow and prosper.

Name:

Mid and West Wales Fire and Rescue Service

Description:

Mid and West Wales Fire and Rescue Service is responsible for providing public safety information, prevention and protection programmes, and emergency response cover for Mid and West Wales.

Location:

Carmarthen, South Wales

Employees:

Approx. 1300

> "Better service is the biggest win and that's what we are here for?"

Andy Pughsley,
Incident Command Manager

Why did you decide to undertake leadership and management training?

Historically most training had been aimed at our operational resource and there was little focus on those in leadership or management roles. Promotions were generally gained by successfully completing the relevant sector or internal qualifications before moving on to the next level.

We know that our managers had great skills and valuable knowledge but they had a limited understanding of the business side of things and lacked understanding of the influence they had on the way things were done. We recognised that to be successful we needed to run our service as more of a business and in order to do that we that we needed to develop a new style of leadership and management across the organisation.

We wanted to create a culture where everyone knew the part they had to play and where they understood the financial implications of what they were doing.

What training took place?

We worked with Neath Port Talbot College to tailor courses to match the needs of our business, specifically focusing on increasing the range of skills and behaviours needed to effectively lead and manage people.

We also aimed to develop our managers' understanding of the financial management aspects of running the business in order to help them understand the part they could play in controlling costs whilst continuing to deliver high levels of service.

We were conscious that we are asking more than ever of our managers and it was important that we gave them the skills, knowledge, tools and techniques to enable them to effectively manage their people in their part of the business.

Managers from supervisor level to mid-level completed ILM Level 3 or ILM Level 5 Leadership and Management courses. Both uniformed and support staff attended the courses together which was a great way to promote team working and develop longer lasting partnerships between colleagues

What have been the key benefits?

We've seen some significant changes across the organisations:

- Staff are now more aware of our business plans and strategy and they have a greater understanding of the part they have to play.
- Our reporting methodology has improved significantly – we now measure and review key targets each month and this cycle of reporting allows us to keep focus on what is happening in the business and provide support where it is needed.
- People's adaptability and flexibility is more evident and it allows us to deliver tangible results in a challenging business environment.
- Better use of resources and smarter delegation has given us better results and productivity as well as giving managers time to think and strategise.

How have you measured the value or return on investment (ROI) of leadership and management training?

We are certain that investing in our management teams has been instrumental in improving the way we do business and the service we offer.

The Wales Audit Office Report issued in May 2013 gave us some very positive responses to how we are running our business and managing our improvement programme. Some of the highlights included:

The authority's evaluation and reporting is better than previous years.

The business planning arrangements are much improved, provide a clearer picture of actions and are more outcome-focused.

Good progress is being made to address the proposals for improvement identified in previous assessments. The actions needed to achieve delivery of the improvement objectives are clearly set out and are monitored by senior managers.

Performance review is a routine and regular function throughout the organisation. Performance results are analysed, with the information being used to identify actions to address areas of weakness and future challenges.

We also conduct peer reports with other fire and rescue services across the country and again had a very positive audit from the most recent review.

Why should other businesses consider investing in leadership and management training and development?

Providing our managers with proven leadership and management skills, tools and techniques has enabled them to utilise their assets more effectively and this has translated into improved and more cost-efficient productivity across the business.

Leaders and managers are instrumental to the success of a business and you simply can't afford not to invest in them.

Name:

P&A Group of Companies

Description:

The P&A Group of companies includes: P&A Pallets and Packaging; A garden centre, landscaping and timber building arm and Zest 4 Leisure which sells timber garden products to garden centres.

Location:

Mold

Employees:

91

Why did you decide to undertake leadership and management training?

My initial foray into leadership training was a NLP taster session, which made me realise that if we could really harness the brains of the people working for us we could do so much more with the business.

Within the business there is a high level of employee loyalty and low staff turnover. Many of our managers are 'home grown', which means that like me, they have not always had the training opportunities or higher education that others may have had.

It was important that this training gap was filled in a way that would develop managers and leaders who could create and sustain the culture of our business. Our key objective was that any learning would have a direct impact on profitability and growth of the company.

What training took place?

After my initial taster of NLP, I wanted to learn more about leadership so my landscaping manager and I went on the Art of Leadership course with Learning to Inspire which promised to develop, train and nurture those who really want to have a positive influence on themselves and others in their organisation. Since then, we have put every one of our managers in our organisation through the Art of Leadership and I've personally followed it up with a fascinating foundation degree in NLP.

What have been the key benefits?

The leadership and management training I've undertaken has had a massive impact on my vision for the business and has improved how I manage and lead the organisation. It has allowed me to look strategically at the direction the business needs to be going in and develop our plans for growth and profitability.

> "I can categorically say that if I'd not done the Art of Leadership course at least two parts of my business would have at least stood still and would more than likely have folded. Now all of my businesses are flourishing and we've recently expanded our premises."

Steve Morgan,
Managing Director

I can categorically say that if I'd not done the Art of Leadership course at least two parts of my business would have at best stood still and would have more than likely folded. Now all parts of my business are flourishing and we've recently expanded our premises.

Within the team I see my managers taking more responsibility and being more committed and involved in the business. They have confidence in themselves and take it upon themselves to do things they may not previously have considered or would have ignored. Each of them knows what part they play in the continued success of the business.

How have you measured the value or return on investment (ROI) of the leadership and management training?

We've not formally calculated the ROI but our business results and growth in a period of recession are something we attribute directly to this leadership and management intervention.

In 2012 we reached over £5 million turnover which is a 6.5% increase in turnover year on year. In Q1 2013 turnover was up 11% on Q4 2012.

We've recently expanded and diversified and have taken on 18 new members of staff as well as buying new premises to accommodate our growing business needs.

We are so certain that it was worth the investment that we continue to invest significantly in leadership and management development. For example, two of our senior managers have recently started an Executive MBA at Glyndwr University.

Why should other businesses consider investing in leadership and management training and development?

Having formal training and an understanding of proven methods and techniques has given me the clarity of vision and a comprehensive toolbox that enables me to run the company in a more businesslike manner.

Using the methods I have been taught, I am able to analyse the markets we operate in and identify market needs and opportunities we can satisfy with our own specialisms. For example, I was able to see that our growth would come from the timber garden products sector and that our core competencies of sourcing quality products at the right price made us competitive in the wholesale sector. Once this was identified, it was a case of outlining the necessary additional skills, which included sales and marketing support and expanding our warehouse space.

In business, if you surround yourself with good people who have the right morals and attitude and provide them with the skills and knowledge that they need to successfully run their part of the business – you will create a winning formula.

Acknowledgements

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- Learning to Inspire
- Neath Port Talbot College
- University of South Wales

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