Which Experiences Matter?

Do you Know which experiences are "Developmental" for your people?

What is "Developmental" Experience?

- Challenging Experiences
  - High-impact/high-leverage
  - Crisis of Personal Limitations
  - "Crucibles" that require the leader to grow
- Novel Experiences

- Components:
  - Awareness
  - Assessment
  - Reflection
  - Feedback
  - Support
  - Growth

Developmental Experiences of Army Platoon Leaders

- Taking charge

- Leading in Combat

- Adapting to Unfamiliar Missions

- Dealing with Indigenous Forces

- Engaging the Populace

- Use of Force (Rules of Engagement)

- Facing Personnel Challenges

- Making Moral & Ethical Decisions

- Sustaining the will to fight

- Dealing with Death

Case-Ex® Process

- Survey/Client Engagement

- Experience Priority/Content Focus

- Case-Ex Interviews (1-2 hours per protagonist)

- Module Development

- Complexity & Quality Ratings

- Beta Test

- Delivery (multiple methods)

What's the best way to transfer experience?

Written Lessons Learned

Verbal Communication

Video How-to

Master/Apprentice Relationship

Simulations/Scenarios

Our Approach

Story = Experience + Communication

Methods

Relationship: Mentor-Protege
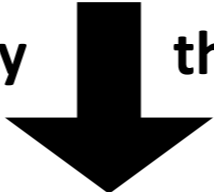
Product: Case-Ex learning modules

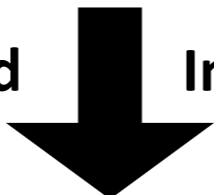Assessment: Decision-Making Obstacle Course

Capture the Experience

1. Identify the target cohort

2. Which experiences are most **developmental** in this job?

List of 35

Survey ↓ **the Field**

Top 10

Focused ↓ **Interviews**

5-10 Stories Each

Mining for Developmental Experience

Tell me about a time…

…where you failed

…where your values were in conflict

…where you thought about leaving the organization

…when you had to make an unpopular decision

…when breaking the rules might have been the right thing to do

…when you had to do something counter-cultural

Your most demanding leadership challenge

One decision that you wish you could have made over

A novel experience (professional education/training didn't address)

A story you'd tell a sibling before he/she takes a job like yours

"Case-Ex" Design

- 1st-person stories of "crucible" experiences
- Parable on Pause
  - Short-format
  - Stop the story at a decision point (WWYD?)
  - Holes in the story allow for construction (Doubloon Test)
- Other Sauce
  - Interviewing Protocol/Methodology
  - Narrative Structure (classical architecture)
  - Measurements

*Tool initially named "Leader Challenge"—now called **Case-Ex**®

What Would You Do?

CASE-Ex®

Results:
Learning

≅**40%** of participants change their approach pre/post

"Learners" performed **28%** better than "non-learners"

Why do some people not learn from others' experience?

Results:
Decision Making Confidence

+46% **"I have the information to act in this situation."**

+61% **"I know what an expert would do in this situation."**

Decision Making/Judgment

- The ability to:
  - Tee up a Problem
  - Gather & Process Information
  - Make a Decision & Act
  - Evaluate & Reflect
- Decision Quality must account for experience
- Expert Intuition builds with experience

Decision-Making Obstacle Course

Decision-Making Obstacle Course

Decision-Making Obstacle Course

1. HOW DOES THIS VIDEO MAKE YOU FEEL?

2. WHICH RESPONSE TYPES DO YOU FEEL ARE APPROPRIATE IN THIS SITUATION?
   Check all that apply.
   ☐ Text Follow-up   ☐ Phone Follow-up   ☐ One-on-One at Work   ☐ One-on-One Off-site

3. WHAT WOULD YOU DO?
   Type your answer here.

4. DO YOU CONSIDER YOURSELF MORE CONFLICT-READY OR MORE CONFLICT-AVOIDANT?
   ● Conflict Ready   ● Conflict Avoidant

5. RATE YOUR CONFIDENCE LEVEL IN HANDLING A SITUATION LIKE THIS:
   (1 being the lowest and 5 being the highest)
   1   2   3   4   5

   Commo   Step by Step   Fellows   Gatesville   Sequoia

   NEXT CHALLENGE

…and in other professions

- Another kind of "platoon leader"

- Turnover is a problem

- Selection is a problem—(WGYHWGYT)

- Development is a problem

- Similar results with Case-Ex method & DMOC

Other Uses

- Ethics Training

- Virtual Mentoring

- Communications Training

- Broadening Applications:
  - Engineering
  - R&D
  - Clergy
  - Law Enforcement
  - Petroleum Industry

Equipping Leaders

Retain Knowledge for Continuity

Capture the best stories from successful leaders

Broaden the Experience Base

Create virtual "developmental" experiences

"Select for & Develop" Decision Makers & Learners

Use others' experiences to choose and grow leaders

Organizational Benefits

- Capture Experience

- Distribute Experience (geographic/asynchronous)

- Extend Experience (longevity)

- Target the Learning Curve

- Reinforce culture & values

- Scale Leader Presence

- Build Resilience