Joanne Deitsch: Training Director

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Author Note

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**Introduction**

The student author targets the position of Training Director at IQVIA. This paper discusses the student author’s leadership characteristics and the skills needed for the target position. A plan of action for daily operations and an eLearning inititive include a discussion of working with decision-making groups, leadership dynamics, transformational leadership, building a vision, diversity awareness, organizational culture and politics, change management, and team building.

**Target Position**

The student author targets the position of Training Director at IQVIA. Compliance officers and sales organzations in the pharmaceutical industry use IQVIA’s software applications. The Training Director of the Product Training Academy has two direct reports who lead teams of trainers and instructionals designers. The team delivers learning solutions for internal personnel and clients who support and use IQVIA’s software.

The Training Director faces two challenges. IQVIA constantly acquires and forms joint ventures with new companies. This results in a fragmented company structure including the learning and development function. The second challenge consists of moving the team from providing only instructor led training to including virtual instructor led training and on-demand eLearning modules as well.

The Training Director interacts with a number of stakeholders. The Training Director reports to the Vice President, Human Resources. The Training Manager and Instructional Design Manager report to the Training Director. Members of the Product Training Academy are located around the globe. There are a number of leaders throughout the organization at the same level as the Training Director that are peers. Customers of the Product Training Academy include business partners whose teams require training. The team supports internal personnel and clients.

**Leadership Characteristics**

According to Cook’s management style assessment, the student author has the most common management style (d) (2007). The concern for both task completion and people are reasonable (Cook, 2007). These managers “initiate middle-ground positions and try to obtain an equitable solution” (Cook, 2007, p. 153). The student author seeks to “maintain a good, steady pace” of work (Cook, 2007, p. 153). These managers assume “that people will work if you tell them why it is necessary” (Cook, 2007, p. 153).

The student author has a C/SD or C/DS DISC work style (Harris, G., & Eikenberry, K. (2018). DISC refers to four major behavioral responses: D for dominance, I for influence, S for steadiness, and C for conscientiousness (Personality Profile Solutions, LLC., 2017). A DISC assessment allows for finer differentiation among the styles allowing for combinations of the styles (Personality Profile Solutions, LLC., 2017). Traits of a C/SD or C/DS style are careful, focused on excellence, results oriented, and collaborative (Harris, G., & Eikenberry, K. (2018).

The student author’s top five strengths are connectedness, input, intellection, learner, and maximizer (StrengthsFinder 2.0, 2009). “Instinctively, you underscore what people have in common even though their backgrounds, experiences, languages, cultures, or interests vary greatly. You facilitate dialogue between individuals” (StrengthsFinder 2.0, 2009, p. 2). “The act of reading allows you to generate options for dealing with all sorts of predicaments – this is, difficult, perplexing, or trying situations” (StrengthsFinder 2.0, 2009, p. 3).

The findings from the assessments give an idea of the student author’s management style. The student author favors a participatory style of leadership (Kanter, 1981). Favoring collaboration and discussion as well as seeking equitable solutions match both the student author’s traits and this management style (Kanter, 1981).

**Needed Skills**

The Training Director needs to articulate the new vision for training delivery to the team and business partners. Critical thinking skills are needed to formulate a comprehensive strategy. Communication skills both written and verbal are important for expressing the new direction to others.

The Training Director must take on the role of change agent. Understanding the stages of change in a corporate environment are the first skills needed for success in the change effort. Proficiency in collaboration and persuasion are needed to make the team and other learning partners effective members in the change effort.

The Training Director handles a diverse, global team. The diversity encountered are cultural and generational in nature. Competences in handling these types of diversity are a job requirement as team members are located throughout the globe.

**Plan of Action: Daily Operations**

The plan of action are presented in two parts, one discussing daily operations, the second discussing the eLearning initiative specifically. The daily work of addressing requests for training projects must go forward in tandem with the development of the eLearning initiative. The plan addresses the topics of working with decision-making groups, leadership dynamics, transformational leadership, building a vision, diversity awareness, organizational culture and politics, change management, and team building. The topic of working with decision-making groups are addressed in both sections. The topics of leadership dynamics, diversity awareness, organizational culture and politics, and team building are addressed in this section.

Heller (1973) describes the Influence Power Continuum which explores five methods of decision making ranging from total ownership of decisions to delegation. The student author plans to use joint decision-making with leadership, business partners, and direct reports in the initiation of new learning projects. The Training Director delegates the execution and delivery of learning projects to direct reports and team members.

The Training Director sets the tone in regards to team diversity. The Training Director and direct reports need to undergo an evaluation of the leader intervention skills described Ayoko & Hartel’s (2006) model. Training and coaching will address any gaps found in task, social, or cross-cultural conflict management skills (Ayoko & Hartel, 2006). The Training Director and direct reports need to undertake the same evaluation, training, and coaching activities for generational diversity.

The Training Director guides direct reports in working with all team members to further build understanding regarding cultural diversity among the team. The agenda at monthly team meetings will include Awareness sessions about the nine cultural dimensions (Javidan, Dorfman, Sully de Luque, & House, 2006). Each team member contributes individual insights on each dimension in a shared discussion forum between meetings. Debriefs on the nine cultural dimensions will replace the awareness sessions over time.

The Training Director guides direct reports in working with all team members to further build understanding regarding generational diversity among the team. The agenda at monthly team meetings will include Awareness sessions about generational differences. Each generation differs in communication style, change management, and technical skills (Lipman, 2017). Each team member contributes individual insights on the three dimensions in a shared discussion forum between meetings. Debriefs on the generational dimensions will replace the awareness sessions over time.

Traditionally, IQVIA leadership has not highly regarded the learning and development function. In addition, the fragmented company structure contributes to a lack of standards and procedures within the learning function. The Training Director’s team will develop standards and procedures. In the process of implementing the eLearning initiative, the team will endeavor to improve the businesses perception of the team. Truly changing the perception of leadership will take time to move the needle from a negative view of learning and development to a positive one. The Training Director, the Vice President of Human Resources, and the Training Director’s direct reports all play critical roles in making the changes discussed here successful from the top-down and the bottom-up.

The student author will use Tuckman's model of small group development to plan activities at each stage:

The first stage of the model is ‘testing and dependence’. In this stage, the group becomes oriented to the task, creates ground rules, and tests the boundaries for interpersonal and task behaviours. This is also the stage in which group members establish relationships with leaders, organizational standards, and each other. (Bonebright, 2010, p. 113)

As the Training Director, the student author will set up meetings to get to know the team in a group setting. Current ground rules and organizational standards are discussed at individual meetings with the direct reports. The Training Director must set the standard for professionalism and team work especially during these early interactions.

The second stage of Tuckman's model of small group development:

… represents a time of intergroup conflict. This phase is characterized by lack of unity and polarization around interpersonal issues. Group members resist moving into unknown areas of interpersonal relations and seek to retain security… In this stage, members may have an emotional response to the task, especially when goals are associated with self-understanding and self-change. Emotional responses may be less visible in groups working toward impersonal and intellectual tasks, but resistance may still be present. (Bonebright, 2010, p. 114)

The Training Director will work closely with the direct reports to provide support during this stage. The overarching message of expectancy rather than expectations may help address inevitable conflicts during this stage. “With expectation we’re waiting for something specific that we want to happen and we’ll be disappointed if it doesn’t. With expectancy, we release our own agenda in a person’s life, allowing changes to happen that we can’t control…We can be members of his team, supporting and influencing him to become a better life player” (Bechtle, 2012, pp. 57-58). Expectancy helps team members keep an open mind when dealing with others. The Training Director acts as a sounding board and guide in situations when direct reports need help resolving interpersonal conflicts. In extreme situations that require escalation, the Training Director engages the VP Human Resources and the team’s HR Business Partner.

“During the third phase, the group develops cohesion. Group members accept each other’s idiosyncrasies and express personal opinions. Roles and norms are established… Task conflicts are avoided in an effort to insure harmony” (Bonebright, 2010, p. 114). The Training Director and direct reports continue to lead a variety of team meetings set up after the initial meeting from all-hands team meetings to one-on-one meetings. Leadership provides guidance and support to direct reports in the execution of projects and daily operations.

“In the final stage… structure is supportive of task performance. Roles become flexible and functional, and group energy is channelled into the task” (Bonebright, 2010, p. 114). The Training Director and direct reports turn attention to professional development opportunities for team members. Continuous improvement of existing procedures are undertaken in this step.

**Plan of Action: eLearning Initiative**

This section discusses the eLearning initiative specifically. Working with decision-making groups are addressed in both sections. The topics of leadership dynamics, transformational leadership, building a vision, and change management are addressed in this section.

Heller (1973) describes the Influence Power Continuum which explores five methods of decision making. The student author plans to use joint decision-making with learning peers and direct reports to get feedback on the eLearning initiative which encourages personal investment in the project (Heller, 1973). The student author will own the eLearning initiative and provide detailed explanations with business partners (Heller, 1973). Explanations are important to ensure understanding and initiate any additional dialogue needed to move the initiative forward.

Kanter defines “power as the capacity to mobilize people and resources to get things done; in this sense, it means capacity or efficacy, rather than domination or control” (1981, p. 221). The Training Director needs to build relationships and collaborate with all levels of the organization in order to formulate and deliver on the strategy. The Training Director will create a team of peers and direct reports to collaboratively create the strategy and communication materials regarding the initiative. Communications directed to business partners are written in a way that avoids learning and development jargon. The Training Director will liaise with business partners to gain buy-in. Other communications to learning professionals discuss the drivers and refer to industry best practices. The Training Director empowers direct reports and team members to develop and deliver procedures, templates, and training for the entire team.

The student author has practical work experience with implementing similar eLearning change initiatives. Since the leader has successfully completed projects such as this in the past, this can contribute to the collective efficacy of the group. The Training Director must enthusiastically articulate the vision, express certainty that the team can reach the goal as well as coach and assist the team (Yukl, 2012). When “collective efficacy is high, people are more willing to cooperate with members in their group in a joint effort to carry out their mission” (Yukl, 2012, p. 313).

The vision must stress the drivers for the initiative as the Training Director serves as the proselytizer for the project. The drivers for moving to eLearning include saving money on travel expenses as well as conforming to external customers who already embrace eLearning as a typical delivery mechanism for training. In addition, the vision must address the perception in the organization that instructor led training provides the only quality learning solutions. When building the vision for IQVIA, the student author would take on the role of proselytizer (Westley & Mintzberg, 1989). “Proselytizers depend on others to stimulate their vision” (Westley & Mintzberg, 1989, p. 26) and the Training Director must actively solicit feedback as part of sharing the vision with stakeholders.

The Training Director plans to follow Pietersen’s (2002) six rules of change: 1) create a simple, compelling statement of the case for change, 2) communicate constantly and honestly throughout the process, 3) maximize participation, 4) if all else fails, remove those who resist, 5) generate short-term wins, and 6) set a shining example. Pietersen’s (2002) rules of change are in line with plans discussed earlier in this paper.

**Conclusion**

This paper shows that the student author has the capability to fill the position of Training Director at IQVIA. Multiple assessments show the student author’s capabilities include a balanced concern for task completion and people’s well-being. The student author’s management style and natural tendencies favors collaboration and seeking equitable solutions with team members. The Training Director position requires that a leader can articulate a compelling vision of the new eLearning initiative, act as a change agent for this initiative as well as for the team’s change in working with this new leadership team member, and handle a culturally and generationally diverse team.

A plan of action for daily operations discusses the dimensions of working with decision-making groups, leadership dynamics, diversity awareness, organizational culture and politics, and team building. The Training Director employs joint decision-making with leadership, business partners, and direct reports in the initiation of new learning projects. The Training Director delegates the execution and delivery of learning projects to direct reports and team members. The Training Director ensures that team member’s diverse cultural and generational needs are taken into account. The Training Director engages team members at all levels to change the current negative perception of the learning function. Tuckman’s model of small group development provides the framework for to plan building trust among team members.

A plan of action for the eLearning initiative discusses the dimensions of working with decision-making groups, leadership dynamics, transformational leadership, building a vision, and change management. The Training Director employs joint decision-making with leadership, business partners, and direct reports in developing and implementing the eLearning initiative. The Training Director forms a team to create the strategy and communication materials as well as liaises with business partners to get buy-in on eLearning modalities. The student author’s previous experience in this arena helps to gain trust from team members. The student author will take on the role of proselytizer to build the vision for the initiative. Pietersen’s steps for change are used for implementing this project.

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