



“We wanted our leaders to set clear expectations and goals with their direct reports and have constructive conversations with them rather than just conducting performance reviews.”

Client Story

Building a Culture of Consistent Leadership

WEX is a global leader in financial technology solutions. Their acquisition strategy helped them grow rapidly, but each acquisition brought varied leadership styles to the organization. They were challenged with defining consistent leadership behaviors and creating a leadership development strategy that allowed leaders at all levels to gain insight into their leadership and to develop valuable habits.

“We were very intentional about defining the behaviors we wanted our leaders to use so we could provide development opportunities that focused on specific skills and capabilities. Our goal was to have a culture of leadership consistency at all levels,” says Brittainy Charette, lead, leadership excellence. “Our engagement survey results showed employee engagement and enabling leadership behaviors, but inconsistently across the organization. We knew we could improve if our leaders would consistently use fundamental skills to build talent and help their direct reports reach their goals.”



Brittainy Charette

SLII® from Blanchard® was a critical component of the foundational skills WEX was looking for, while additional content in their broader leadership development program offered learning experiences for all levels of leaders. The company was able to create a core leadership development program, Leaders Unleashed, which consists of unique development plans: a unique two-month learning program for emerging leaders, a four-month program for managers, and a six-month program for directors, vice presidents, and senior vice presidents.

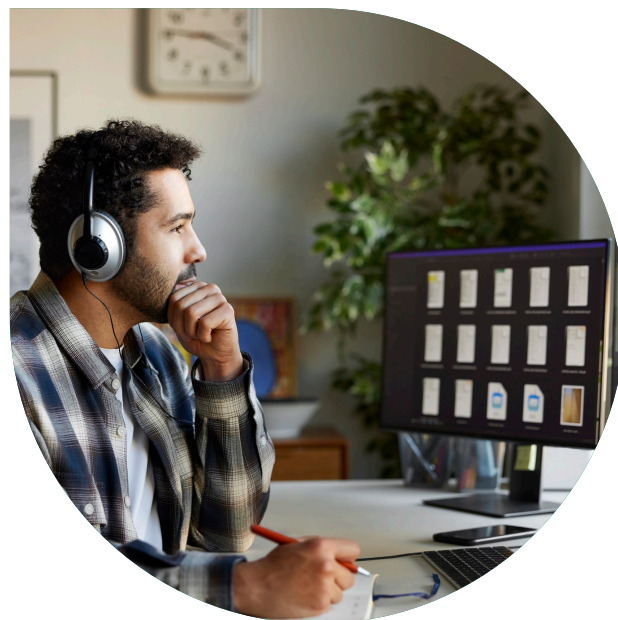
Emerging leaders are trained in both Self Leadership and Blanchard Management Essentials®, while leaders at the Director and above level receive training in SLII®. Managers who complete Management Essentials can also complete SLII®. “We just finished piloting the Leading People Through Change® program and it was a big hit, so we will be rolling that out, too, to all managers,” says Charette. “We always have new initiatives taking place and acquisitions are part of our growth strategy, so providing development opportunities that allow leaders at all levels to understand and manage change is critical for us as an organization.”

The Self Leadership training program teaches participants the importance of being responsible for their own success by being proactive, challenging assumed constraints, and activating their points of power. They learn how to lead themselves so that they can lead others.

Management Essentials presents four core conversations leaders need to be able to conduct with their direct reports. Participants learn how to discuss setting goals, praising a job well done, redirecting performance when needed, and wrapping up a project to honor the employees and the work. This program also presents four communication skills: Listen to Learn, Inquire for Insight, Tell Your Truth, and Express Confidence.

SLII® teaches leaders how to set goals, provide the right amount of support and direction to each team member as they navigate certain tasks, and give feedback effectively. It focuses on helping leaders have productive conversations using a common language that empowers direct reports to achieve their goals.

Leading People Through Change teaches leaders how to identify, address, and resolve their people’s questions and concerns about change to increase their buy-in and commitment. Participants learn about the five predictable stages of concern and are introduced to a high involvement strategy that helps them identify the stage each team member is in. The brilliance of the program is how it teaches leaders to have specific, meaningful conversations with their people at every stage of concern so that they can address individual issues and support change initiatives.



Even before COVID, Charette and her team had designed a blended delivery option that included both in-person and virtual components. “We found that learning transfer happened more quickly with small virtual classes spread out over a week instead of two full days of training. When we did three- to five-day leadership development programs, people just went through the training and got back to work. They usually had a lot to catch up on and it was more difficult to start applying new skills, even though we tried to be intentional about following up with people to help them apply the skills after they had been away from their regular tasks. But when people attended the virtual classes, we saw application happening right away. A participant could leave a training session, then go right into a meeting and apply the new skills on the spot.”

The virtual training option allowed the company to extend the development experience, which gave participants time and permission to dive in and practice new behaviors immediately, and over time, to create long-lasting behavior change and habit formation. This blended, virtual format also brought together a more diverse group of learners.

WEX facilitators delivered the virtual sessions and learners were able to access all the content through Blanchard Exchange. This platform offers tools—including forms for one-on-one meetings, conversation starters, articles, videos, and more—that help leaders master the skills. After training, participants have access to the Self Leadership, Management Essentials, and SLII® courses on the Degreed platform for practice and review. To take the learning further, they are given access to other programs such as Building Trust, Communication Essentials, Conversational Capacity®, Coaching Essentials®, Team Leadership, and Leading People Through Change. Learners can go through these programs at their own pace and convenience.

Sustaining the Learning

WEX uses a variety of sustainment tools to keep the learning alive in their organization. “Participants in all of our development programs use a learning journal so they can document all their learning and reflections in one place,” says Charette. “We not only ask them to make notes in the journal during the training sessions, we also encourage them to record learnings from town hall meetings, webinars, and other learning experiences. Anything they learn should be recorded in the journal, so it is easy to access.”

The Blanchard content on the Degreed platform also serves as a sustainment tool. “We were excited to learn about the Blanchard content that is available on Degreed,” continues Charette. “In addition to the program content, learners can access a host of curated content including blogs, podcasts, and research documents. When participants finish their Blanchard program, they are given access to specific online courses to practice and review what they’ve learned. Having the content on Degreed is a great complement to the original learning experience. Also, I like to put notes in the Degreed pathway to remind people to add information to their journal.”

Linking Training to Corporate Goals

Charette encourages anyone creating a learning strategy to tie it to the strategy and goals of the company. “You must know what outcomes you are trying to achieve as a business in order to design a learning strategy that will deliver the most value. The Global Talent Development team works with corporate strategic pillars in mind to make sure we are heading in the right direction. We wanted consistent leadership at all levels and the Blanchard content provided the learning foundation we needed. My advice is to be curious and think critically about the many, many options that we have as learning professionals to ensure that your solutions and offerings are in close alignment with your organization’s ultimate goals.”

Charette measures results in various ways. “Our formal people leaders and their teams take a 360-degree assessment prior to participation in the Leaders Unleashed program, and again six months after it ends. It is a good way to measure behavior change, and an indication of success when we see leaders putting the new skills into practice and their direct reports notice that change in behavior. I also know we are on the right path when a vice president goes through a session and then asks if their whole team can go through it.”

“At WEX we pride ourselves on being innovative—and we know strong leadership is an important part of that innovation. We think the true core of leadership is to always be learning, so it’s been fulfilling to see our people constantly wanting more development opportunities.”

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