

# Developing Your Business Leaders

A Guide to  
Investing  
at All  
Levels



**Tina Schust Robinson**



## More Praise for *Developing Your Business Leaders*

“Some books on leadership development stand out because they provide actionable steps to follow. Others because they are comprehensive, covering all the important issues. A few are exceedingly well written. This book is unique in being all three.”

—**Jack Zenger**, CEO, Zenger Folkman

“Tina Schust Robinson’s book, *Developing Your Business Leaders*, is indeed a leadership love story. Told from the heart, it maps out a leadership and professional development road map that’s easy to master and that builds new organizational muscle via an investment in your company’s most critical asset—its senior executive and frontline operational leadership teams.”

—**Paul Falcone**, Bestselling Author, Consultant, and Former CHRO, Nickelodeon Animation Studios

“Tina Schust Robinson clearly has a passion for developing leaders—something I strongly share, particularly in our increasingly turbulent and uncertain world. This book lays out important principles and specific strategies that top leaders and HR professionals can follow to help their companies develop a strong cadre of leaders, providing bench strength in this important area. I recommend it as a useful field guide for organizations that are passionate about developing more and better leadership.”

—**Susan J. Ashford**, Michael and Susan Jandernoa Professor of Management and Organization, University of Michigan

“Tina has created a true masterpiece and game changer for anyone looking to elevate leadership development in their organization. Packed with practical strategies and real-world examples from an operator’s perspective, it’s a must-read for creating impactful, sustainable leadership investment at all levels.”

—**André V. Branch**, CEO, r.e.m. Beauty

“Oftentimes, leaders are thrust into power without a safe place to land. And because they have a disproportionate influence on everyone, our investment in leaders can lead to true impact. With *Developing Your Business Leaders*, you’ll learn how important it is to invest in leaders and what they need at their core to thrive.”

—**James Nicholas Kinney**, Global Chief People Officer

“The lessons and insights Tina shares in this book are powerful and will help anyone interested in growing, developing, and mentoring the next generation of business leaders.”

—**Eric Stettler**, Partner, Kearney

“*Developing Your Business Leaders* delivers a rare blend of rigor and practicality, turning leadership development into a clear, ROI-focused investment plan that teams can execute immediately. The book also models the human-centered leadership that our emerging technology era requires, keeping people, ethics, and measurable outcomes at the heart of innovation.”

—**Milton Mattox, PhD**, CEO, United States Artificial Intelligence Institute

“This fresh approach to simplify the process of developing great leaders will become your indispensable guide for success. What sets this book apart from others is the focus on why leadership development is needed and how to measure the return on this important investment.”

—**Jack J. Phillips, PhD**, Chairman, ROI Institute; Author or Editor of More Than 100 Books

“As a fellow leadership investor, I savor the fresh insights that Tina brilliantly offers around the *why, what, who, and how* to actualize leaders and leadership.”

—**Dave Ulrich**, Rensis Likert Professor Emeritus, University of Michigan; Partner, The RBL Group

“Tina’s uplifting and hands-on advice reminds us that leadership development is essentially self-development, beginning with why rather than the how and what. Backed by real-world experiences, a sense of humor and wit, and full of practical applications, *Developing Your Business Leaders* is not just for leadership development practitioners because, ultimately, everyone has a moral obligation to be the best leader they can be.”

—**Barry Z. Posner, PhD**, Michael J. Accolti, S.J., Endowed Professor of Leadership; Chair, Department of Management and Entrepreneurship, Leavey School of Business, Santa Clara University

# Developing Your Business Leaders

A Guide to  
Investing  
at All  
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**atd**  
PRESS

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**Tina Schust Robinson**

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## Preface

# My Personal Why

## A Leadership Love Story

I love developing leaders. I love the moment their mindset shifts (the aha lightbulb). I love seeing leaders find the courage to try something new—a new way of inspiring, delegating, or stretching themselves. I love seeing the ripple effect of better leadership spreading to those being led, which then influences how they lead others. And I have devoted my career to figuring out this work, or this ideal, that we call leadership.

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**"Choose a job you love, and you will never  
have to work a day in your life."**

—Popular proverb, often attributed to Confucius

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My first exposure to leadership was bossing my siblings around (the required role of the first-born). I hadn't yet learned how to lead through influence—I was taller, stronger, and had the wisdom of age, so it was a total power grab. Whether it was how we played with Barbies or ate our food, I cajoled my sister and brother into doing things my way.

I rarely succeeded. Yet, somehow, they became thriving adults.

My grades and gumption led to higher education opportunities. At the University of Virginia, I pursued leadership roles such as recording secretary of a service fraternity and president of the student union-run

movie theater. These hands-on roles taught me how to lead from the front. There was no one to boss around, and leadership meant making decisions, attending meetings, staying late, and doing the work. I'd like to believe both organizations were better off after I played these roles (although, due to a messy breakup with the treasurer, the service fraternity may not have a complete record of financial transactions for a semester).

In my first professional people management role at a large state university, those I led were older than me (I was 28) with more experience and strong opinions. I experienced imposter syndrome, despite having a top business school degree and a premiere management consulting position on my resume. It was another chance to adapt how I led and to seek mentors within and outside my organization. Earning my team members' respect was immensely gratifying, and we accomplished terrific things together during turbulent economic times.

That role set me on a path—not just of being a leader, but of investing in those who lead and honing my leadership development capabilities. I have been a leader in multiple industries (healthcare technology, energy logistics and distribution, enterprise software, and retail and e-commerce fashion) and multiple functions (human resources, sales, and operations). I have taught leaders at all levels in the corporate world and invested in the leaders of tomorrow as Professor Tina, teaching undergraduate and graduate students. I speak about the leadership challenges I faced and overcame at global conferences and on podcasts and webinars. And I was invited to write this book.

Now, 25 years into my career, I take a “mad scientist” approach, testing investment strategies on myself before offering them to others. And with every investment, every role, every opportunity, and every client, I realize that it rarely seems like work because of how much I love what I do.

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“A journey of a thousand miles begins with one step.”

—Lao Tzu

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If you're a leadership investor like me, you know that we are only with leaders for part of their 1,000-mile journeys. While together, we can

redirect or accelerate their steps, but those journeys will continue long after we part ways.

How can we optimize the travel experience, making it both practical and purposeful? How can we help organizations get the most out of their leaders quickly and consistently? How can we help individual leaders unleash their full potential? In other words, how do we leave leaders better off for having us as guides and companions? That's the big question I wanted to answer when I said yes to writing this book.

I hope that we'll discover the answers together.

Our journey starts here—and my leadership love story continues.



# Introduction

## Doing Better for Leaders

My organization offers multiple leadership development initiatives, but leaders don't understand why they should participate, so they don't.

My organization is all over the place with leadership development. It doesn't feel like we're targeting the right audiences with the right content to achieve the right results.

My organization doesn't know where to start with leadership development, nor how to prioritize programs that optimize our limited resources, so we don't offer anything.

My leaders need help and I'm being asked to help them. But I need help!

Throughout my career, I've heard these frustrations from smart, dedicated professionals—from CEOs to consultants—who want to develop their organization's leaders. If you can relate to any (or all) of these scenarios, this book is for you.

Leaders are role models, vision keepers, and performance coaches. Organizations rely on them to inspire and instruct and to drive and direct—all in service of achieving strategic outcomes. Organizations spend time and money to ensure their leaders have what it takes to meet expectations. According to ATD's *2025 State of the Industry* report, 69 percent of surveyed

organizations offer executive development training and 90 percent offer managerial training.

So, why does so much research point to a growing leadership crisis? The data tells a disturbing story.

- **Capability gaps among leaders persist.** In McKinsey's *The State of Organizations 2023* report, only 5 percent of respondents who were asked about the urgency of addressing capability gaps reported being "already set." And 90 percent reported the need to act "soon" or "now." The remaining 5 percent said it was too late.
- **Quality ratings for leaders remain low.** DDI's *Global Leadership Forecast 2025* survey asked leaders to rate the quality of their own leaders. Only 40 percent gave them a high rating, which was barely above the survey's inaugural rating of 37 percent.
- **Many leadership development programs are ineffective.** Research conducted in 2024 by TalentLMS, an award-winning learning technology provider, revealed that only 8 percent of managers think their company's leadership development initiatives are fully effective.

Yet, there is hope if we're willing to break through the barriers holding organizations back from unleashing their leaders' potential. The 2023 McKinsey study cited specific obstacles contributing to limited (or no) capability building, including programs that were neither tailored to specific skills gaps nor integrated into employees' on-the-job experiences and programs that weren't aligned with business outcomes.

## **We Can Do Better**

Our programs can be better. It's time to change how we approach investing in leaders. According to DDI (2025), leaders were *15 times more likely* to rate the quality of their own leaders highly when their organizations offered high-quality leadership development experiences.

This book offers a reimagining of leadership investment based on my experience coaching, advising, and collaborating with leaders at all levels. I've also included the collective wisdom of business executives, nonprofit

leaders, management consultants, talent development experts, and human resources professionals across industries who shared their experiences.

You might be wondering about the term *investment*. Part of this re-imagining is to treat leadership development as an *organizational investment* requiring a solid business case that connects every activity back to an outcome-driven why.

It's easy to be swayed by industry colleagues who swear by coaching, love mentoring, or insist on virtual training. But too often, these one-off and unintegrated initiatives produce limited results that aren't reinforced or maintained. The programs become orphans, starved for attention and eventually forgotten. I've seen the most delightfully designed, fantastically facilitated leadership programs fail because they were not connected to organizational reality. All that investment—time, money, and resources—produced limited, if any, returns.

Leaders deserve better. We, as leadership investors, can do better.

## **You Invest in Leaders**

Let's say you are a founder who recognizes how critical the right leaders are to bringing your startup to life. Or you are a C-suite executive or department head who needs your leaders to do the right things in the right ways. Or maybe you are a talent development or human resources professional watching leadership programs go unattended, or skills remain unlearned, and you want to change your approach.

Your shared connection? You all are leadership investors. You intentionally cultivate the potential of your leaders by committing resources to expand their capacity to inspire, innovate, and thrive as they deliver organizational results. You don't just cheer on leaders from the sidelines; you invest in long-term outcomes. You see leadership investment as a business imperative that's vital to the achievement of strategic priorities. You recognize that leaders are the link between vision and execution, and it's through their direction that a workforce is mobilized and motivated.

You're not satisfied with just initiating another training program or hiring another coach. You're thinking long-term—prioritizing sustainable

leadership pipelines over check-the-box activities that deliver short-term performance gains. You envision great leadership as a differentiator and the only way for your organization to succeed.

## **Your Leadership Investment Field Guide**

I'm a passionate lover of the outdoors. I recharge my workplace brain by escaping my office, ideally for a weekend camping trip in the California desert. Tucked among the professional books on my office shelves are field guides on astronomy, native plants, and hiking trails—everything I need to optimize my adventure. So, I like to think of this book as a field guide for creating the business case for investing in leaders.

Like any good field guide, this book offers clear, concise tips for navigating and interacting with your environment. It's a portable problem-solving resource to help you create and execute the business case for leadership investment in any organization. It includes stories based on real-world situations from many of my real-life clients and employers, although I've anonymized names and specifics. (To borrow a few lines from the classic radio and TV show *Dragnet*, which described actual cases from the Los Angeles Police Department: "The story you are about to hear is true. Only the names have been changed to protect the innocent.") These adapted examples inform and bring to life the field guide's practical tools and advice. I also offer occasional "compass checks" to give you a chance to pause and reflect on where you've been and where you're going.

As you begin reading, I ask you to resist the temptation to go straight to the *how* of leadership investment (part 2) in favor of grounding your investment recommendations in organizational priorities (part 1).

In part 1, chapter 1 offers the *why* of leadership investment. Why does it matter that leaders are high quality? Why does it matter that leaders' capability gaps are closed? It may seem obvious to those of us immersed in the topic, but our programs need the commitment—financial, emotional, and managerial—of senior leaders and executives to succeed. We need to connect the dots between achieving strategic objectives and the quality of the leaders who are driving that achievement.

Chapter 2 moves us to prioritization—the *what* of leadership development. There's a lot to do. There are so many behaviors and skills we can

help leaders hone, but which are most critical to their success and that of the organization? Notice the link from the *what* back to the *why*.

Chapter 3 is about personification, or *who* will benefit from your investment. Leaders at different levels face different challenges, are held to different organizational expectations, and have different skills gaps. We will explore how to tailor your defined *what* to four general audiences: program managers, frontline managers, managers of managers, and senior leaders.

In part 2, chapters 4 through 7 shift into execution—the *how* you’ve been itching for. We will review a unique framework that provides options for curating an integrated leadership development offering. Based on what the organization needs from its leaders, and what the leaders want from themselves, we can invest in three ways:

- **One-to-one leadership investment** builds skills through coaching and mentoring (one professional working with another).
- **One-to-many leadership investment** builds skills through training, with many leaders benefiting from one instructor. Training can be self-study, virtual, or live and in-person. The one-to-many programs are not personalized to individuals. I will share best practices for implementing training that achieves your desired *what* and aligns with your *why*.
- **One-to-all leadership investment** weaves leaders into all aspects of the talent life cycle. Leaders receive intentional consideration and attention, from recruiting and onboarding to performance and goal management through development and succession planning to rewards and retention. These are talent development processes, programs, and policies that affect all employees, and are ripe for extension into your leadership development sphere.

Think of these approaches as toolboxes, or containers for different investment tools. Tools have specific purposes, helping us accomplish different tasks in different situations. We can use a screwdriver to bang in a nail in a pinch, but it’s not optimal or efficient. If we only have a screwdriver in our limited leadership investment toolbox, it’s tempting to use it to solve all our problems instead of learning how to use a hammer. And sometimes we must step out of our comfort zones and explore less familiar or more complex tools, stretching ourselves in the process.

Each tool, or leadership investment approach, stands on its own, but ideally they can be used together. I will describe what each approach is and isn't and why it's effective, as well as share best practices for implementation.

In each case, you can choose to start small to whet appetites and earn early wins or start larger to gauge what works. Target specific leaders with specific initiatives or wrap leaders in a cocoon of transformational multifaceted support.

Just start somewhere. This book will help you do that.

Chapter 8 closes the book with the actualization of your leadership investment. How do you measure your success? This is challenging because leaders are not machines and growth doesn't follow a straight line.

Leadership development is not like buying a new piece of technology that lets you immediately track output. You're investing in people with emotions, habits, relationships, blind spots, and untapped potential. It's messy, nonlinear, and deeply human.

In the concluding chapter, I offer creative and strategic ways to assess your return on investment and develop confidence in your abilities as a leadership investor. By the end, I hope I'll convince you that the positive impact of intentional leadership development at all levels—aligned with your organization's *why*—is real, powerful, and well worth the investment.

Part 1.

# THE WHY, WHAT, AND WHO







## Chapter 1

# The Why

## Justifying Your Investment in Leadership Development

No matter how well-designed, well-structured, and well-delivered your leadership investment program is, it won't achieve optimal returns unless you connect it to a *why*. Not why you are a leadership investor, why you think upskilling leaders is important, or the *why* described in articles and podcasts, but the larger *why* of your business. Why does it matter to your organization that leaders think and act in certain ways? Why is leveling up leaders one of the company's strategic priorities or an operational objective? In this chapter, you will find a practical framework for designing a business case that starts with asking and answering the *why* questions and makes connections between the critical investments you make in leaders and the return your organization can expect.

As leadership investors, we move fast. We often have too much to do and lack the time and resources to do it all. So, we take shortcuts—we bypass validating the business reasons for our investment agenda and dive into execution before we're truly ready.

No matter how legitimate your approach to leadership investment is, you need to ensure you're fully aligned with your stakeholders. Let me share a story to bring this concept to life.

Early in my career, I led the human resources function for a multistate region at a petroleum distribution organization. Private equity investors had bought multiple distributors and wanted to breathe new life and new processes into companies that were set in old ways of doing business. I was up for the challenge (even though I swear I saw them scrape the word “personnel” off my office door just as I arrived). In my first week, I was invited by the regional president to join his leadership team meeting.

When I arrived, Leo, the vice president of operations, stared at me for a moment, and then said, “HR doesn’t attend these meetings.”

“We do now,” I responded.

Armed with financial reports and insights shared by the president, and with ears and eyes wide open to listen and learn, I inserted myself and the HR team firmly into the day-to-day life of the business. In my first month, I received a request from Leo, the operations leader, to create training for his managers on how to give feedback and hold their employees accountable. Easy. I’d designed and delivered that content multiple times through my career. However, instead of dusting off those slides, I asked for a meeting with Leo. I told him that before I could honor his training request, I wanted to ride on a fuel truck for a day.

“Uh, why do you want to do that?” he asked warily.

I said, “Because if I’m going to support you and your team, I need to understand what your team does, including what people experience on the job. I need to establish trust. I need to understand the whole business and why it operates as it does if I’m going to be your partner. And because our core business is transportation, I need to understand our drivers’ experience to help you develop the managers who lead them. That way, I can design training that is relevant to your leaders and clearly connected to their business priorities.”

He stared at me for a moment, and then smiled and called the transportation director to arrange my ride. Our relationship progressed from there, and soon I was Leo’s first call to brainstorm workplace challenges. I could have bypassed this adventure and just rolled out manager training. It would have saved me a 3 a.m. meetup on a cold morning and an uncomfortable (but quite exhilarating) truck ride. But that would have been a shortcut

with long-term consequences. My fuel truck adventure established me as not your typical HR leader, but rather someone who wanted to align with what really mattered to the organization.

## **Reframe Your Thinking as a Leadership Investor**

I began my job at the petroleum distributor determined to reframe how the organization thought about leadership investment. One of my favorite issues of *Harvard Business Review* featured multiple articles on that topic—reimagining the HR function. The provocative cover appealed to me, as I have long found it amusing how often the business world talks about redesigning, reengineering, or reinventing human resources (and how the scrappy function finds ways to survive). *HBR* decided not to be subtle and suggested explosives as an option to accomplish the job.

I saw so many opportunities for reimagining people processes and programs affecting engagement, development, and retention. I could have launched into all those areas, knowing the business would benefit from fresh ideas and following my bright shining *why*. But I didn't.

I learned in that first meeting with my peers that my *why* was not their *why*—at least not yet. I also discovered that I needed to better understand what was important to them and what kept them up at night so I could align my programs and initiatives accordingly. I soon recognized that I might not be able to do all that I wanted right away, but I could certainly do many things that would make a positive difference to the business.

The challenge for me in those early days was learning to reframe my focus as an investor in people. This is the same challenge others in similar positions face today.

We want to invest in leaders for a variety of important reasons, including strengthening engagement, improving sales, nurturing healthy work cultures, and increasing profits. Most of us have read the research that links effective leadership to stronger engagement. For example, Gallup (n.d.-a) reports that up to 70 percent of the variance in engagement across teams is attributable to their management, and Zenger Folkman (2019a; 2019b) links good leadership to higher sales and profits. Research from MIT focuses on better leadership to combat toxic culture (Sull et al. 2022).

More mundane, but equally valid, reasons that drive us to invest in better leaders include:

- Leadership investment is on our to-do list if we are talent development, organization development, HR, or L&D professionals.
- We're cleaning up the messes caused by past ineffective leaders, such as high turnover or legal actions.
- We have invested effectively in leaders at other organizations in the past and want to repeat the successes.
- We believe that this is just what organizations that are known as “great places to work” do.

These are all valid justifications for our faith in good leadership development. But they will never inspire full commitment from executives because our justifications don't match what the organization values most.

In short, our *why* and the organization's *why* don't align.

## **Prioritize Business Outcomes**

Leadership investment is a tool to help organizations achieve their desired outcomes. If organizations view leadership as a problem to be solved, then leadership investment can help solve it. But we first have to identify the problem and convince the organization that it is worth special attention, even among other competing problems (including industry trends, economic forces, and global pressures). If we don't link investing in leaders to achieving business outcomes, buy-in from our stakeholders will be limited at best. They simply won't champion us.

Investing in leaders requires that we step up—and possibly step out of our comfort zone—as business partners to prioritize business outcomes in our work. And for that, we need to make a business case.

## **Make Your Business Case**

Before we examine how to make a strong case for investing in leaders, I will warn you that even if you make strong connections within your organization and prioritize business outcomes, you will still need to work hard to achieve your desired outcomes, not just those of the organization as a whole. Let's take a first step toward aligning your *why* and your organization's *why* by exploring the business case for leadership investment.

## Understand the Business Case Triangle

I love this quote from HR and management expert Peter Capelli (2015):

Like any other function, HR must show why the issues it addresses matter to the business and that it has sensible ways to manage them. . . . HR should craft company-specific (and industry-specific) policies that respond to today's challenges.

Capelli is talking about learning the language of the business case. A *business case* is a document that justifies undertaking a project or initiative. Its main purpose is to assess the potential benefits, costs, and risks of a project, providing evidence to decision-makers for why the investment is worthwhile (Atlassian n.d.).

Early in my career, I learned a lot about making a business case when I led operations for a global team of consultants that helped cloud solutions customers at big organizations justify investment in HR technology. The documents and presentations we created helped HR leaders develop business-driven arguments that would resonate with executives. In my conversations with HR customers, I noticed they usually started by discussing functionality and features and then backed into justifying why the organization needed that particular technology solution. In other words, they began with the amazing tool (the *how*) instead of the problem that needed to be solved (the *why*). In contrast, I was always interested in understanding the problems first, which included:

- The many weeks required to produce headcount reports, which slowed down workforce planning and hiring for critical roles
- Lack of data linking different HR processes, such as recruiting and performance, to turnover, which prevented any strategic talent management storytelling or precise and cost-effective targeting of talent sourcing
- Endless hours invested in conducting performance evaluations, talent reviews, and merit increase assessments, which reduced HR's availability to support the business in other valuable ways and cast doubt on the function's ability to keep up with the times

Despite all these challenges, my HR customers wondered why they were struggling to convince chief financial officers to fund the new cloud solutions they were hoping for.

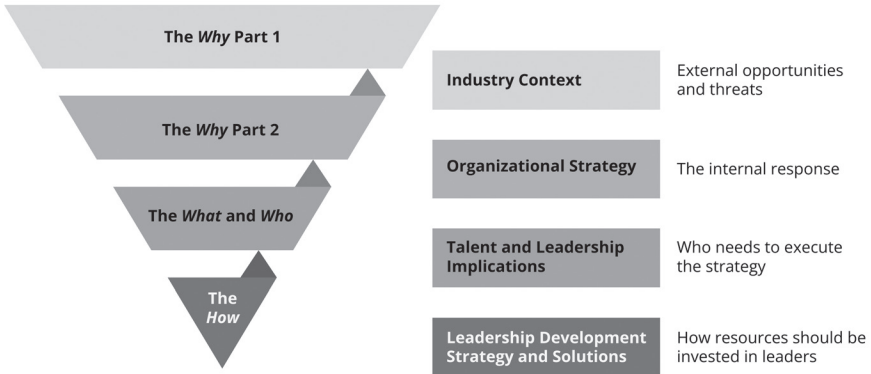
To improve my understanding of the dynamics, I started watching account executives (AEs), noting who was more successful in closing these HR deals. Some AEs saw technology as a way to solve their customers' problems. The AEs who embraced solution selling generally outsold colleagues who took a more transactional, product-focused approach. *Solution selling* simply means starting with the customers' needs and pain points and providing recommendations to address them. In my company, those recommendations might or might not include the HR cloud products.

I decided to unite the AEs' solution-selling mindset with my knowledge of what goes on in the minds of HR professionals and add a big dose of business acumen. (I'm always grateful I earned that MBA.) To illustrate how these approaches work together and to help those cloud solutions customers learn how to anchor their *why*, I created the business case triangle (Figure 1-1). While the tip of my original triangle was HR technology, the framework applies to most business case scenarios. In this chapter, I'll go through each of the four levels of the triangle to illustrate the business case for leadership investment. We'll start by considering the industry context and end by creating a leadership development strategy and solutions.

Your business case starts with the industry context. This includes the big-picture trends and challenges organizations in your industry must navigate. Your organization's response to these trends and challenges—including how it harnesses strengths to optimize external opportunities and manages weaknesses to mitigate external risks—becomes its strategy.

To execute a strategy well, organizations require people—the right people in the right roles doing the right things in the right ways with the right skills, all managed with the right leadership. As leadership investors, we can evaluate the capability gap in our organizations to help us analyze how to invest, asking the crucial question: *Do our leaders possess the right skills, demonstrate the right behaviors, and bring the right experiences to help execute our business strategy through the workforce?*

**Figure 1-1.** The Business Case Triangle



If the answer is a definite *no* or an ambiguous *not really*, then we know our organization requires a strong leadership investment strategy, or a master plan for translating the organizational *why*, *what*, and *who* into a practical how-to approach for leaders. This investment might be a one-to-one offering, like coaching or mentoring. It might be a one-to-many program, such as skills training. Or it might be a one-to-all approach incorporating leadership development into existing talent-related processes to ensure the organization is recruiting, onboarding, and promoting leaders who can drive the achievement of strategic priorities.

### **Resist Starting With the How**

Notice that in the business case triangle, designing and executing a solution (the *how*) is at the bottom. That's because it is your final destination—where you arrive after gaining a full understanding and appreciation of the organization's needs.

And yet, leadership investors often start with the *how* because this is our comfort zone. The *how* is tangible and allows us to cross tasks off our checklist, which is so satisfying (I love a good list). It also gives us bragging rights in department meetings and town halls and could open doors to future opportunities.

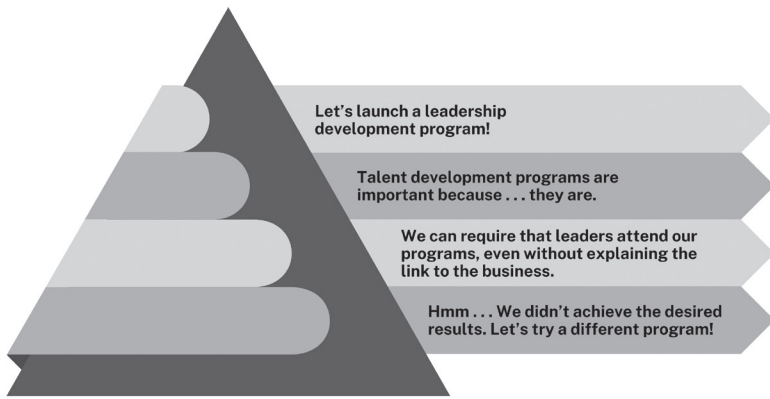
I hope I can convince you that starting with the *how* instead of the *why* of the business case is like product-based selling. Your customers will end

up with a bunch of tools, systems, and frameworks but no real solution to their problems—and those tools, systems, and frameworks might not even talk to each other.

Just as successful sales managers put the customer first by starting with their *why*—all the pain points and challenges—as leadership investors, we must put our businesses first by starting from the *why*.

What happens if we don't put our business's *why* first? Behold, another triangle—one we *do not* want to copy (Figure 1-2).

**Figure 1-2.** The Leadership Development Strategy Triangle



Imagine starting—as you probably have at some point—with an enthusiastic shout: “Let’s offer coaching!”

You don't know yet if your business really needs coaching. You don't know if the business's leaders want coaching. You don't know if coaching is the best or right way to invest in your particular leaders. All you know is that coaching has worked in other organizations in other circumstances.

This is a well-intentioned but misguided approach that's more common than you might think. I've been hired by organizations as a result of this enthusiasm, and I hate to diminish it. But without solid anchoring in what matters to the business, coaching becomes (wait for it) an HR thing—what HBR warned us about. Just an HR (or talent or people) initiative dreamed up to pull leaders away from doing work that really matters to the business.

I know that may seem harsh, but if the program isn't driven by a clear *why*, any leaders who do participate won't know what to do with the insights they gain. The program will lack support from the leaders' managers, and you'll find that after investing time, money, and effort, the return on investment (ROI) is minimal.

Behaviors won't change. Skills won't level up. Attitudes won't shift.

You may have executed your how beautifully, but it didn't make a difference to the business, and you may have lost credibility as a result. I've seen this happen. You may have too. I'm sharing it as a cautionary tale. As leadership investors, we can do better, and we owe it to the organizations we support and the leaders we serve to make business cases that give our investments a fighting chance to earn returns.

### **Avoid Repeating Your Mistakes**

You've probably heard the saying, "The definition of insanity is doing the same thing over and over again and expecting a different result." Although he's often credited with this pithy quote, it turns out Albert Einstein didn't say this. (It comes from an article describing an Al-Anon meeting and was also cited in a pamphlet printed by the Narcotics Anonymous organization. Stick with me.) No matter the source, this truism describes our fight against the insanity of constantly repeating failed leadership investment programs. To win the fight, we have to build a case before launching our programs.

Take a few minutes to reflect, and then we'll walk through the triangle in more depth.



### **Compass Check**

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When did you experience an insanity moment with a failed leadership investment initiative? Be honest. Ask yourself:

- ▶ How effective was your business case?
  - ▶ How clear was your *why*?
  - ▶ If you could get into a magical time machine, what would you have done differently?
-

## Understand the Industry Ecosystem

Organizations exist within ecosystems. Every day, outside forces buffet, bewilder, and boost them. You will better understand the context in which your organization exists by widening the lens you're looking through. With a more expansive view, you can see the full ecosystem more clearly, and that will lead to questions like:

- What are the industry's current trends?
- What are the challenges?
- What's going well for most organizations?
- What has changed in recent years and continues to evolve?
- What's disrupting this industry today?
- What might disrupt this industry within the next year or three years or five?

This information isn't that hard to find, especially if you know how to search the internet or use (and double-check) an AI tool. Here's an example. You might remember the biotechnology company Moderna, which focused on messenger RNA (mRNA) therapeutics and vaccines during the COVID-19 pandemic. The company's 2023 Annual Report, the "Summary of the Material Risks Associated With Our Business," included a list of industry challenges that certainly must have kept the CEO and shareholders up at night. In just a single page, the report's authors provided a clear snapshot of the industry ecosystem the company had to navigate:

- Difficulties producing, shipping, or successfully commercializing COVID-19 vaccines consistent with existing or potential contractual obligations
- Limited sales, distribution, and marketing experience that required agreements with third parties to achieve revenue targets
- Evolving dynamics in the market for COVID-19 vaccines, such as increased production costs per dose and lower product revenues
- Increasing and intense pharmaceutical market competition
- Market acceptance by physicians, patients, third-party payors, and others in the medical community
- Continually evolving regulatory paths for COVID-19 vaccines

We will revisit these challenges in a few pages as we progress through the triangle. But first, it's your turn.

## Map Your Industry's Ecosystem

It's relatively easy to educate yourself about what makes your industry tick. Start with internal sources—annual reports, strategic plans, and conversations with business leaders. Then, move to external sources, leveraging search engines and AI tools. Consider using alerts to track breaking news related to your industry. Other valuable sources of information include:

- **Industry reports and market research.** Major research and consulting firms like Gartner, McKinsey, PwC, and IBISWorld regularly publish detailed reports on different industries, and the SEC EDGAR database features annual reports for all publicly traded companies in the United States.
- **Trade associations and industry bodies.** Many associations and other industry organizations also publish reports and updates on trends. These organizations provide opportunities for networking, mentorship, and exclusive content that can deepen your knowledge when you become a member.
- **Industry news outlets, including newspapers, trade magazines, and journals.** *Bloomberg*, *Reuters*, the *Financial Times*, and more niche, industry-specific news sites report real-time information on developments.
- **Trade magazines and journals.** These smaller publications provide specialized content relevant to specific industries. For example, *TechCrunch* focuses on tech and communications, and *PharmaVoice* covers the pharmaceutical industry.
- **Industry-specific conferences.** When you attend conferences, webinars, and seminars, you have direct access to experts and thought leaders.



### Compass Check

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Consider your organization's industry. What are its biggest challenges or headwinds? What are its grandest trending opportunities? Brainstorm two or three resources you can explore to learn more about your industry's big picture.

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## Understand Business Strategy

Organizations create strategies to mitigate the risks of industry challenges and to optimize the potential of favorable industry trends. Think of business strategy as an organization's internal reaction to external forces.

Our widened lens is starting to narrow.

## Know Your Strategy

How well do you really know your business strategy? If you scratched your head or rolled your eyes while reading that question, then it's time to learn more about high-level business strategies, including:

- Growth in core markets through pricing, product, or service differentiation
- Expansion into new markets, including new audiences and geographies
- New product development and investment in innovation
- Cost management, operational excellence, and increased efficiency
- Mergers, acquisitions, spin-offs, and partnerships

Let's return to our earlier example of Moderna, an organization that successfully executed several strategies on our list to tackle its challenges. In its 2024 proxy statement (Moderna 2024b), after highlighting its 2023 performance, the company listed these current strategic priorities:

- **Commercial execution.** We are focused on commercial execution to drive sales growth and profitability. This includes building on the current momentum from US Spikevax sales and preparing for multiple product launches, including the expected launch of our RSV vaccine candidate and other potential launches in 2025 and beyond.
- **Disciplined investment.** We plan to continue to review our cost structure to find efficiencies, and to remain disciplined around spending. We expect to leverage our existing manufacturing and commercial infrastructure as we launch new products in our respiratory franchise in 2024 and 2025.
- **Executing on late-stage pipeline.** We are focused on advancing our late-stage pipeline to drive organic sales growth. Moderna expects to launch up to 15 products in the next five years, with up to four of those launches possibly occurring by 2025.

## Analyze Your Business's Strategy

To understand your business's strategy, start from the inside. Use the internal sources that you have access to and indulge your curiosity. Pay attention in town halls. Review copies of quarterly operating plans. Look at your leaders' goal plans because their objectives likely support larger strategic aspirations.

Then get personal. Invite cross-functional colleagues to have coffee, lunch, or just a chat. Formulate a list of questions to guide the conversations and boost your self-confidence if this is pushing you outside your comfort zone. Start with the simplest questions, especially if you already know a lot about the organization and its larger industry context and primarily want to validate your understanding. For example, you could say:

- Tell me the top two or three trends you see affecting our industry now.
- Describe the two or three critical strategic initiatives you would favor to optimize the opportunities or navigate the risks from these trends.

### More Business Strategy Questions for Your Colleagues

To broaden and deepen your knowledge, consider these topics and related questions when sitting down with the executives at your organization.

#### Core strengths and direction:

- What problem is the organization uniquely positioned to solve?
- What are the biggest strategic bets you're currently making?
- How has your strategic focus evolved over the past few years?

#### Competitive positioning:

- Who do you consider our most formidable competitors? Why?
- What sustainable competitive advantages do you believe the organization has?
- What emerging market trends keep you up at night?

#### Growth and innovation:

- Which growth opportunities are you most excited about?
- How do you balance short-term performance with long-term innovation?
- Where do you see the greatest potential for disruption in the industry?

**Challenges and risk management:**

- What's the biggest strategic challenge facing the organization right now?
- How are you preparing for potential economic downturns or market shifts?
- How are you mitigating the risk that comes from XYZ industry trends?

**Try the SWOT Approach**

When analyzing business strategy, you may want to consider the SWOT—strengths, weaknesses, opportunities, and threats—approach. This long-established framework offers a comprehensive and balanced perspective that examines both internal factors (strengths and weaknesses) and external factors (opportunities and threats). You can use it to understand how your organization's strategy is leveraging its strengths to capitalize on opportunities while addressing weaknesses and mitigating threats.

To assess your organization's strengths, pull insights from your internal review of the organization's priorities and initiatives. Ask yourself:

- What unique capabilities or resources give your organization a competitive edge in the market?
- Which of your current product lines or services perform strongest? Why?
- What customer relationships or market positions represent your greatest assets?

To identify weaknesses, consider that same internal review and ask yourself:

- Which internal processes create bottlenecks or limit your strategic execution?
- What aspects of your business model are most vulnerable to disruption?
- Where do you see the greatest misalignment between strategy and implementation?

To examine opportunities, refer to your study of the industry and ask yourself:

- Which emerging market trends could the organization capitalize on in the next one to three years?

- What untapped customer segments offer the most promising growth potential?
- How might technological advancements create new opportunities for the business?
- What strategic partnerships or acquisitions is the organization considering to accelerate growth?

To understand your organization's threats, look externally and ask yourself:

- What competitive pressures concern you most in your primary markets?
- What economic, social, or regulatory uncertainties pose risks to your business model?
- How are changing customer preferences or behaviors threatening your current offerings?
- What emerging technologies or business models could disrupt your industry?

I love using frameworks like this because they prevent me from missing something or forgetting to ask a critical question. As a leadership investor, you'll need to keep your ears and eyes open for how leaders will affect and be affected by this strategy, which we'll cover next.

## **Understand Talent Implications**

What will your organization need from its employees—the people your leaders will be inspiring and directing—to achieve its strategic objectives? Before we can define the leadership requirements to execute the strategy, we must understand the people implications. Let's revisit our examples of high-level strategies:

- Growth in core markets through pricing, product, or service differentiation
- Expansion into new markets, including audiences and geographies
- New product development and investment in innovation
- Cost management, operational excellence, and increased efficiency
- Mergers, acquisitions, spin-offs, and partnerships

Each of these strategies represents an approach to capitalizing on industry opportunities and mitigating risks and challenges. And each way of reacting

to external forces affects an organization's internal operations—specifically, its people. Growth in core markets might mean hiring more employees like the ones you have or upleveling your existing workforce. Expanding into new markets might mean hiring people with different skills in different locations or reskilling or relocating incumbents. New product development demands the communication of an inspiring vision and the creation of a culture that supports risk taking, curiosity, and creativity. Cost management and operational excellence require disciplined and streamlined processes and close attention to the details. Is the company merging, acquiring, or partnering? You'll need adaptability, flexibility, and big doses of change resilience.

Once again, let's return to the case of Moderna. In its 2023 10-K report, the company listed potential “difficulties in managing the development and expansion of our company, which could disrupt our operations” as a risk factor (Moderna 2023). Here is an excerpt:

As of December 31, 2022, we had approximately 3,900 full-time employees in 17 countries, and we expect to continue to increase our employees and the scope of our operations. To manage this global expansion, we must continue to implement and improve our managerial, operational, and financial systems, expand our facilities and recruit and train qualified personnel. Our management may need to divert significant attention away from our day-to-day activities to manage these development activities. Successfully developing products for and fully understanding the regulatory and manufacturing pathways for the many therapeutic areas and diseases we seek to address requires a significant depth of talent, resources, and corporate processes to allow simultaneous execution across multiple areas. We may be unable to effectively manage this simultaneous execution and expansion of our operations or recruit and train qualified personnel, which could cause weaknesses in our infrastructure, give rise to operational mistakes, loss of business opportunities, loss of employees and reduced productivity among remaining employees.

The talent implications of Moderna’s strategy include concerns about hiring, onboarding, and upskilling employees to support growth while still maintaining current operations. To put it simply, the company has one eye on today and another on tomorrow.

That same report also listed a risk factor related to Moderna’s ability to retain key employees, consultants, and advisors and to attract, retain, and motivate qualified personnel:

Our ability to compete in the highly competitive biotechnology and pharmaceutical industries depends on our ability to attract and retain highly qualified managerial, scientific, technical, quality-control, manufacturing, medical, regulatory, and commercial personnel. The turnover rate in our industry is high. In addition to competition from other companies, we compete with academic institutions for individuals with certain skill sets. In some instances, failure to attract and retain personnel could result in delays in production or difficulties in maintaining compliance with regulatory requirements. In addition, adverse publicity, including as the result of failure to succeed in preclinical studies or clinical trials or applications for marketing approval, may make it difficult to recruit and retain qualified personnel.

The industry’s war for talent directly affects Moderna’s capacity to achieve its strategic objectives. As a result, the organization faces pressure to more creatively source talent and, most likely, to seek a balance of technical skills and culture fit to encourage retention.

### **Evaluate the Talent Implications of Your Business’s Strategy**

You’ve asked questions about your organization’s industry context and strategy, and you’ve been noting potential employee implications. Now, use these questions to go deeper with your assessment:

- **Where are the organization’s most critical talent gaps?** Gaps between current and desired staffing levels may create greater challenges for or put more pressure on the leaders in those areas.

- **What new skills or capabilities will employees need to develop to execute the organization’s strategy successfully?** Leaders will be asked to support this development, and they may share some of the same development needs.
- **Which roles or departments will see the most significant changes due to the organization’s strategic direction?** This can help identify leader populations that will benefit from earlier investment, potentially becoming proofs of concept for your larger investment strategy and approach.
- **How might the strategic direction require shifts in organizational culture?** Leaders help shape and maintain culture, so significant changes mean greater challenges and opportunities to be addressed through your investment strategy.
- **How is the organization supporting employees through periods of strategic transition or uncertainty?** This may give you an early window into potential approaches to your how—talent and leadership investment approaches that already have the organization’s buy-in.
- **What have you as a leadership investor learned from previous strategic changes?** Take your lessons learned about the talent implications of the organization’s strategy decisions, build on what has worked, and revise things that didn’t work.

## Understand Leadership Implications

What about the implications of business strategy for the leaders who are directing the work of employees? This book is about investing in leaders, so it’s time to understand how business strategies affect them.

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**“Leadership is an observable pattern of practices and behaviors and a definable set of skills and abilities.”**

—James M. Kouzes and Barry Z. Posner, *The Leadership Challenge*

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One of the simplest descriptions of leaders is that they are the people who help get things right within an organization’s workforce. In other words, they get:

- **The right people**, by conducting workforce planning to identify and help recruit and interview the people they need
- **In the right roles**, by connecting desired organizational outcomes to the work required to achieve them and translating it all into jobs and responsibilities
- **Doing the right things**, by aligning business goals with team and individual goals so people know what they're working on, how it supports the organization's strategy, and why it matters (aligning with vision and mission)
- **In the right ways**, by regularly reviewing performance, sharing actionable feedback, and making team changes as needed (a return to right people)
- **With the right skills and support**, by evaluating the knowledge and capabilities of their employees, identifying and assigning development opportunities, holding their employees accountable for completion and application, coaching to deepen both confidence and competence, and recognizing and rewarding results

The question for us, as leadership investors, is: Do we have the right leaders with the right skills demonstrating the right behaviors doing the right things to help get things right with the workforce? We must also ask ourselves what we expect from leaders at every level, from project and program managers to the C-suite. What attitudes, mindsets, skills, and behaviors are we hiring for, teaching, and rewarding?

### **Examine the Leadership Implications of Your Business Strategy**

In my discussions with executives, I often ask a few deceptively simple questions to explore the leadership implications of their business strategies. You can address these same questions with your leaders.

- To execute your strategy, what competencies must your leaders demonstrate?
- How do these competencies differ across leadership levels?
- What competencies are leaders at various levels demonstrating well now, and how does their work support business strategy execution?
- What are the biggest competency gaps at each level that create risk for the execution of your strategy?

The answers to each of these questions will begin to uncover the *what* and *who* of leadership investment, which we will turn to in the next chapters.

## **Coming Full Circle**

We have explored various ways to make the business case for leadership investment and arrived at the tip of our business strategy triangle (Figure 1-1). I'll admit, using this framework is aspirational. As leadership investors, we've all succumbed to the temptation of the *how*, giving the organization what it requested. Coaching? Sure. Training? Why not. We've thrown the development spaghetti at our leaders, noted which strands stuck, and then boiled our next pot of water.

We need to find the balance between tactical and transformative.

When I was at that petroleum distribution company I mentioned earlier, I said yes to many short-term requests in favor of building trust to make longer-term investments. I honored leaders' complaints about the performance management process by streamlining and simplifying the forms while also coaching those leaders on how to have meaningful feedback conversations—a skill that's more critical to business success than checking boxes and selecting ratings.

I listened when leaders grumbled about how boring compliance training was and, again, streamlined and simplified while explaining the business case for legally appropriate behaviors. I earned trust day by day, truck ride by forklift ride. (Yup, I tried that too.) In doing so, I led the modernization of the HR function and established it as a true partner to the business.

If the ultimate measurement for a for-profit organization is financial, then we achieved that goal. The business was sold a few years after I arrived, and the investors were happy. My hope is that the employees benefited (professionally and personally) from being led by better-trained leaders as a result of the changes we implemented, and that those leaders also benefited professionally and personally from their investment. And I hope that my peers, including that vice president of operations, embraced their new HR colleagues more readily as they continued their careers in other organizations.

I'm a big believer in having a growth mindset, which means every experience is an opportunity for learning. During my time at the petroleum

distribution company, I learned the critical importance of leadership investors as true business partners and the value of a business-aligned why. The point of this chapter was to help you learn it too. Next, we'll explore the competencies that leaders must demonstrate to navigate industry challenges and execute strategy. It's time for the *what*.





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## About the Author



**Tina Schust Robinson, MBA**, is a globally recognized voice on leadership and the founder of WorkJoy, a firm dedicated to helping leaders at every level unlock their potential. Drawing on nearly 30 years of multi-industry experience across sales operations, technology consulting, and talent development, Tina helps organizations translate strategy into behavior and potential into performance. Recognized as a top 100 human resources influencer and Professional Certified Coach (PCC), she is a trusted advisor to executives leading through complexity and change.

Her clients include global brands such as FOX Sports and SAP, national nonprofits like the National Wildlife Federation, and renowned institutions such as UCLA Anderson, where she coaches in the executive MBA program. She has also taught in the business schools at Loyola Marymount University and California State University Long Beach.

Her insights on the human side of strategy appear in leading industry publications and on multiple podcasts. Known for her no-fluff, high-impact style, she's a sought-after speaker on the global conference stage and a go-to voice for organizations ready for transformation, not just theory.

Tina holds degrees from the University of Virginia (BA) and the University of Michigan (MBA). She lives in Los Angeles with her writer husband, rescue puppy, and two beloved parrots who keep her humble and honest.



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