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EMOTIONAL INTELLIGENCE

Lessons learned from implementing EI programmes – the cutting edge of emotional intelligence interventions

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In this article, Geetu Orme and Steve Langhorn draw on their own diverse, but complementary, experiences to highlight the four key features of implementing successful emotional intelligence programmes.

There is a growing awareness that emotional intelligence (EI) provides explanations about the factors that contribute to business success. Yet, while there is considerable evidence to help our understanding of the skills involved, the methods of developing individuals' EI competencies are much less widely known.

Our aim in this article is to build on the knowledge of designing and delivering effective EI interventions to highlight four key features: winning the support of strong internal advocates; identifying a strong business case for the programme; building the internal capacity for delivering the intervention; and creating a strong link, through research, between the outcomes of the programme and business improvement.

In particular, the authors draw on the experience of Whitbread's Pub Restaurant Division, where the authors collaborated for more than a year on an EI intervention. First, though, we begin by setting the context for this article, and then describe briefly the background to the Whitbread project. In a third section, we highlight the main steps involved in planning and implementing a specific EI intervention.

At each step, we comment on what the experience was like for us, and what seemed to make a difference. This perspective is from the commissioning senior manager (in this case Steve Langhorn of Whitbread) who is acting as a spokesperson for the 15 people in his company who have been the main implementers of this work. His commentary is supported by an external provider (Geetu Orme of Ei

(UK) Limited) who was involved in discussions, and the design and implementation of programmes. Additionally, key managers involved in the implementation of the programme have contributed their perspectives (see the acknowledgements for details of those involved).

CONTEXT

There have been 12 issues of this journal published since its name changed from *Competency* to *Competency & Emotional Intelligence*, and at least two articles on EI have appeared in each of them. Some articles have focused on specific applications of EI (such as recruitment or leadership), while others have focused on underlying aspects of defining EI and articulating what it means for human resources practitioners.

This article is designed to build on the four-part series written by Geetu Orme and Kate Cannon called "Everything you wanted to know about implementing an EQ programme" (published in this journal over four consecutive issues from Autumn 2000 to Summer 2001 inclusive; the key points arising from the series are summarised in box 1). That series was, in turn, a development and extension of guidelines published by the EI Consortium, which in 1999 laid out for the first time some important steps in building an intervention focused on EI (these guidelines can be found on the website www.eiconsortium.org).

The authors have agreed to combine and share perspectives in order that others may shorten the learning curve when embarking on a new intervention.

Implementing EI programmes

1. SUMMARY OF KEY POINTS FROM EARLIER ARTICLES

“Everything you wanted to know about implementing an EQ programme”, by Geetu Orme and Kate Cannon.

Article 1: Getting started (Autumn 2000)

Challenges you might face

- inappropriate reasons for implementing emotional intelligence
- your own state of low readiness
- impatience: yours and the organisation’s
- insufficient respect for the topic

Conducting the needs assessment

1. situation analysis;
2. vision;
3. readiness of key advocates;
4. measures of success; and
5. potential emotional intelligence interventions.

Article 2: Design (Winter 2000/2001)

The parameters

- who are the participants?
- what are the learning objectives and outcomes and how will they be measured?
- who is the decision-maker who will approve the design?
- how soon does it have to be delivered?
- what are the implications of the organisation’s culture?
- who will be teaching it?
- what is the budget?
- which emotional intelligence model will serve as the organisational framework?
- what access to external resources do you have?

Design principles:

- are you following sound adult-learning principles?
- is the design learner-centred?
- are you optimising accelerated learning techniques?
- have you created a learning environment that supports emotional learning?
- have you selected training media that suit the participants and will deliver the outcomes?

Challenges

- inadequate content and design expertise
- the “grab-bag” approach
- inadequate time to create an effective design
- assuming that “one size fits all”
- the emotional intelligence of the trainer
- meeting your own needs rather than the learner’s needs
- failing to plan for contingencies

Article 3: Taking the show on the road (Spring 2001)

Guidelines:

1. Fostering a positive relationship between you and your participants
2. Maximise self-directed learning
3. Set clear programme goals
4. Break goals down into manageable steps
5. Maximise opportunities to practise
6. Provide frequent feedback on practice
7. Rely on experimental methods
8. Enhance insight
9. Prevent relapse
10. Provide models
11. Encourage use of skills on the job
12. Provide an organisational culture that supports learning

Article 4: Assuring the highest standards of implementation (Summer 2001)

- the purpose of evaluation: to prove, to improve, to assess learning/change
- evaluation guidelines: how to conduct an effective assessment of programme effectiveness; focus on continuous improvement, job improvement and business results; use pre- and post-training assessments; select participants for test and control groups randomly; include both outcome measures and performance measures; use external resources for evaluation
- experiences, insights and key learnings. Key pitfalls discussed: stakeholders not clear about what to evaluate; evaluation not perceived to be a priority; other priorities divert attention; inappropriate or sloppy evaluation methodology; the difficulty of isolating training as the key variable in achieving results

Implementing EI programmes

BACKGROUND TO THE WHITBREAD PROJECT

In the previous issue of this journal (vol. 10 no.1, Autumn 2002, pp.17-19), John Weston reported on the Emotional Intelligence Conference that took place on 11 July 2002. Steve Langhorn presented the background to his Whitbread project at that event. Whitbread is an organisation in transition. Its chair, Sir John Banham, describes its recent history as “a transformation of Whitbread”. This has seen the sale of slow-growth businesses to concentrate on more dynamic markets. Whitbread operates in three of the fastest-growing sectors of the £172 billion UK leisure industry – hotels, eating out and fitness. An example of this growth can be seen from the eating-out sector. The total sector is expected to grow from its current level of £25 billion to more than £31 billion by 2005. Within that, Whitbread’s 1,300-plus restaurants currently serve approximately 1.5 million meals each week.

The EI intervention was partly a response to a problem that many businesses face in the leisure market – the need to develop the highest standards of leadership skills, the challenges of high team turnover, the demands of customers for the highest levels of service, rapid change and economic demands. What the company needed among those leading its businesses were people who not only had the highest commercial skills, but also people who were both oriented to and believe in people and teams, and able to champion the service that is given to every guest. It was felt that EI could contribute to developing those skills and abilities that linked with this aspiration.

THE EI PROGRAMME: STEPS IN MAKING IT HAPPEN

The programme to develop leaders through their EI competencies can be broken down into a number of distinct steps that describe what exactly happened and when. There were four main phases of work. Each phase is described below, together with the authors’ comments and a set of general learning points for those involved in other EI interventions.

Prior to December 2001

Phase 1: Early research phase

Main activities:

1. Steve Langhorn researched the topic of “emotional intelligence” through the internet, conferences and books, leading to him making contact with a number of providers in the field.

2. Early meetings with a number of providers to explore the possibilities.

3. The outcome of these meetings was an action plan written in December 2001, relating to an early phase to get senior management buy-in to the work that was planned.

Commentary:

(Steve): This early research phase is an important part of an EI intervention. Unless you know the basics and have formed your own view about the topic, it is hard to engage in a productive discussion about the possibilities in a business. Although my initial interest in this field was spurred by my need to do research for my DBA dissertation, I found myself seeing more and more business benefits from bringing this thinking into our business.

There are many definitions of EI – there are different measures, different providers, and different aspects of expertise involved in leading an initiative. Having some knowledge beforehand meant that I was able to be discerning and “sort the wood from the trees”. I was also aware of some of the pitfalls and the gaps in existing business-case examples. I attended a conference and managed to go to four concurrent sessions during each hour of the conference – this gave me a broad overview of who was doing what. This helped me to identify whom to initiate dialogue with about our company’s programmes.

(Geetu): It was clear to me early on in discussions with Steve that the nature of Whitbread and its successes with its leadership programmes were steering things towards an EI programme that would be largely internally championed and led. This meant that any subsequent design needed to reflect the good work that had been achieved on other programmes within the company. It is important with EI interventions that they build on what an organisation has already achieved.

My key advice to any practitioners out there is to listen to how senior managers talk about their programmes. In this instance, I was struck by the number of times that Steve used the word “we” rather than “they” and the number of instances where he was able to give his own examples for the topics we were talking about. He also spoke with an absolute conviction that I knew would be a major force in ensuring this work was successful.

Implementing EI programmes

Questions to ask yourself before embarking on an EI intervention

1. What do you already know about EI?
2. What are the gaps in your knowledge and how do you plan to fill them?
3. What exists already within your organisation that you can build on when leading an initiative focused on EI?
4. Who is best placed to lead the implementation?
5. What external expertise or resources do you need?

January–February 2002

Phase 2: Getting senior management buy-in

Main activities:

1. A detailed project plan was scoped out involving a senior management team workshop.
2. Training five managers within the company to be qualified to measure someone's Emotional Quotient (or EQ)¹.
3. Undertaking an assessment of the EQ¹ of 24 senior managers, importantly, this would include the executive team.
4. Running a one-day workshop for the senior management team.
5. Managing the details for setting up in-house scoring of the EQ assessments.

Commentary:

(Steve): We decided to make preparations for the rollout of the EI intervention for a group of 250 general managers even before we were sure it was going ahead. There were practical reasons for this – it was important to get the senior guys on board before going full steam ahead, but both needed to be happening at the same time.

The concept of EI was always going to look very new and potentially unusual as an approach to our leadership development. I thought it was important to completely empower our senior team in deciding whether they fully supported the approach, but, more importantly, that they would go out into the field with a high level of ownership.

It was important to have debate openly, so that all views could be voiced and a “go-live” decision made by the managers themselves. But this could only happen through involving our senior managers in a workshop.

We were keen to get their support both for the budget for the rollout and for the implementation plan, which would involve them committing both their time and the time of their general managers. It was important that there was a choice offered and that members of the senior team were able to either endorse the work that we were planning to do or throw it out completely. This was a tense moment for us (the implementing team) at the end of this workshop.

These quotes from other managers in the business show how they articulated the business case for themselves:

Mike Glover, Retail Sales Manager:

“Employees and the organisation both benefit. Employees can use emotional intelligence to develop themselves. The company can use it to enhance performance through recruitment and development. It is linked to Beefeater's Enabling Leadership programme by providing individuals with the ability to make decisions for themselves rather than having them imposed as seen in the 1970s and 1980s. There needs to be a training programme up front to stimulate genuine interest. It is essential to get executive and senior management buy-in. Understand the benefits for your employees and your business and sell them. It might not be easy to generate but these benefits have to be tangible. Do not impose emotional intelligence, it needs to be cascaded.”

Raymond Holloway, Learning and Development Manager:

“Emotional intelligence is important because it allows us to assess the potential of our staff and develop and utilise their inherent strengths.”

Andrew Gammage, Service Quality and Process Manager:

“Within the service industry, 60% to 80% of interaction with guests is often based on emotion. Emotional intelligence drives behaviour so we need to recruit good attitude and then train technical ability. Emotional intelligence provides the tool to recruit ‘good attitude’.”

(Geetu): It was clear to me from the early phases of this work that this was a very fast-paced business. One where the implementation plans would need to match the operating norms of the company.

Implementing EI programmes

2. BAR-ON EQ-i DESCRIPTIONS

These short-form descriptions of the Bar-On EQ-i were used in the Whitbread project.

Intrapersonal

SR Self-Regard: To accurately perceive, understand and accept oneself.

ES Emotional Self-Awareness: To be aware of and understand one's emotions.

AS Assertiveness: To effectively and constructively express one's emotions and oneself.

IN Independence: To be self-reliant and free of emotional dependency on others.

SA Self-Actualization: To strive to achieve personal goals and realise one's potential.

Interpersonal

EM Empathy: To be aware of and understand how others feel.

RE Social Responsibility: To identify with and be a responsible and cooperative member of one's social group.

IR Interpersonal Relationship: To establish meaningful and close relationships.

Adaptability

RT Reality Testing: To objectively test one's feelings and thinking against external reality.

FL Flexibility: To adapt and adjust one's feelings and thinking to new situations.

PS Problem-Solving: To effectively solve problems of a personal and interpersonal nature.

Stress management

ST Stress Tolerance: To effectively and constructively manage stress and strong emotions.

IC Impulse Control: To effectively and constructively control impulses and strong emotions.

General mood

OP Optimism: To be positive and to look at the brighter side of life.

HA Happiness: To feel content with oneself, others and life in general.

The Bar-On EQ-i is a trademark of Multi-Health Systems, Toronto, Canada.

This fast pace both helped to create a momentum but also was a little nerve-wracking on occasions – I was very conscious that this was a one-time-only chance. I was also mindful that the nature of EI is not a “rah-rah” type programme. It starts with deep reflection on your own level of EI, and this is the experience that we wanted to provide for the managers of Whitbread. It was a different emphasis to what I understand had happened on previous leadership development programmes.

Questions to ask yourself during the early phases of your EI intervention

1. Who is best placed to undertake the assessment of EI within your organisation?
2. What is the pace of implementation that matches the preference of the group you wish to involve?
3. Who needs to endorse the programme and what is the best way of achieving this?
4. What are the supporting resources that you will need to have in place, such as those required to score EI assessments?

5. Have you thought through the style of your programme and how you plan to engage the hearts and minds of the groups with which you are working?

March–June 2002

Phase 3: Implementation of GM workshops

Main activities:

1. Scoring of 250 EQ questionnaires for the general manager population.
2. Implementation of one-day workshops in 15 locations around the UK by five Whitbread EI coaches.
3. Research of the star-performer profile for GMs linking EI and existing company metrics.

Commentary:

(Steve): Having the workshop delivered by five EI coaches was important for a number of reasons. We were able to integrate the language of EI into our business more easily by involving people who have lived and breathed the restaurant business. They were able to make the learning immediately relevant to our general manager pop-

Implementing EI programmes

ulation. The investment in these managers was also of real benefit to them as individuals in developing their own skill base – it is exciting to be part of work that is groundbreaking in the business context.

Additionally, it was important that the implementation was carefully orchestrated and sensitively implemented. I want to highlight both of these points. The *careful* orchestration involved the development of robust workshop design, the development of high-quality supporting materials and careful training of the five EI Coaches involved in the implementation. The *sensitive implementation* involved ensuring that all EQ assessments were confidential and were kept separate from personnel/HR records, and that we could seek external advice about any particularly low EQ scores that emerged.

EQ assessments provide a very “deep” level of self-awareness, so it was important that this was handled carefully.

During the implementation, it was clear that managers bought the concept of emotions. They recognised themselves in their EQ results, and we were surprised at the high level of openness among our general managers. It was important to keep the learning rooted in the real world.

Mike Glover, Retail Sales Manager:

“EQ is an accurate way of summarising emotional intelligence. No one challenged its authenticity, unlike some other measures. The workshop provided an opportunity to use emotional intelligence both individually and for improving business performance. I have used emotional intelligence myself and seen my business performance improve. EQ components are linked and they can be used to identify the necessary actions for an individual’s development plan. EQ results are accurate and well received. People have been very positive towards it and have created development plans. It links well to a change programme in that it provides an open and honest review of an individual’s performance. A staged roll-out worked well – it was layered to different departments and different operations teams.”

Raymond Holloway, Learning and Development Manager:

“The experience was very positive. All delegates were on board even when their EQ results were different from expectations. It was important to tell people that this is a powerful piece of information – it isn’t set in stone and it can be developed. People are more open than you think.”

Will Vernon, Operational Change Manager:

“Workshops were generally well received. People were able to see themselves in their EQ results and use it to develop, unlike some other measures. It has the credibility that comes from underpinning research and data, and is easy to understand. It has total confidentiality. This being stated up-front encouraged people to be honest. It has not been used as a means to exit people from the organisation.”

(Geetu): During this phase, my colleagues and I were supporting the workshops very much in the background. It was clear to us that the high levels of motivation of the five EI coaches made a significant impact in the Beefeater business.

Steve and I started to explore the potential for taking the consolidated data from the general manager profiles and conducting analysis on the EQ data to see whether a correlation existed between those EQ profiles and business performance. With the help of Dr Reuven BarOn, the star profile of a highly effective general manager was developed.

Research summary

161 UK Beefeater general managers

109 males; 52 Females

Age range 25 to 54; average age: 37.9

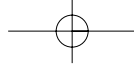
Service: minimum 11 months; average: 4.7 years

Instrument used: the Bar-On Emotional Quotient Inventory (EQ-i)

Four different performance measures were used:

- team turnover;
- team satisfaction;
- guest satisfaction; and
- profit growth.

The initial report has demonstrated high levels of correlation in these results, and the Beefeater human resources team is working with Steve to understand how these findings can be integrated into future initiatives and programmes to drive the optimum return on this valuable set of findings.



Implementing EI programmes

Questions to ask yourself during the implementation phase of your EI intervention

1. What support does the rollout team need to ensure successful intervention?
2. How do you collect and share information during the intervention?
3. What existing performance measures in your organisation can you use to demonstrate that improvements in EI are associated with business improvements?

August–October 2002

Phase 4: Planning and implementation of DGM workshops

Main activities:

1. Reviewing key learnings from phase 3.
2. Adapting the one-day workshop for 250 deputy general managers.
3. Equipping 10 more managers with the ability to assess EQ.
4. Implementation of one-day workshops in 15 locations by 10 Whitbread EI coaches.

Commentary:

(Steve): Following the completion of the first round of workshops with our general managers, it was very rewarding to gain positive feedback from our senior managers that the workshops had been very well received – so well received, in fact, that they wished us to extend the programme to the next level of management in the field. This was a group of around 250 deputy general managers. Again, we combined the one-day EI programme with another set of leadership activities on the second day to create a substantial leadership intervention.

The implementation of the second round of workshops was noticeably easier. This was partly due to the increased skills of our in-house coaches, but also there were more people equipped to deliver workshops. The importance of sustaining momentum for the programme is what is key to me now. There has also been a high level of interest from other teams within the group. This has helped to reinforce our confidence that this is important for our business. The impact of us being able to deliver these workshops is also key.

(Geetu): One year on, it is clear that Whitbread has taken bold steps to bring this thinking into its business. Taking EI to more than 500 employees has been a huge task that has been completed with real pace, quality and a high level of internal ownership. The business is taking time out to evaluate the work done to date and think through the follow-up activity for the future. There are many exciting opportunities open to the organisation.

There is a clearly articulated business case for what specifically makes a difference. The task now is to use this powerfully within recruitment, development and succession planning. This will require a concerted effort from both the operation and human resources functions.

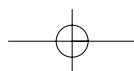
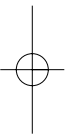
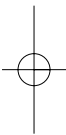
Further questions to ask yourself during the implementation phase of your EI intervention

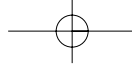
1. Who is best placed to implement an EI programme?
2. What are the respective roles of your human resources and operational functions in issues that affect the implementation of EI programmes?
3. Who are the people with most influence in your organisation, both on formal and informal levels?
4. Who needs to be on board so that your implementation is smooth?
5. What is the best mechanism for feeding back your research results within the business?
6. What are the ongoing development needs of your in-house coaches?
7. How can you ensure that the life of a new initiative is sustained beyond the early novelty factor?

CONCLUSION

We hope that this article will provide greater confidence to readers who wish to embark on their own EI programme. The exact nature of such a programme will depend on what specifically you are trying to achieve and who is involved.

In summary, we believe that the following four aspects have helped to create a successful intervention within Whitbread. We strongly





Implementing EI programmes

believe that these may be differentiators between mediocre and highly successful programmes:

1. Strong internal advocates: Having advocates in the business who are both well thought of and competent.
2. Business case: Making a business case for EI that is relevant to your context and your challenges.
3. Ownership: Having strong internal ownership and, where possible, equipping managers to deliver this work themselves.
4. Research: Having a research string to the intervention so that the links between EI and performance can be articulated.

In the words of Julian Woodall, Head of Learning and Development for Beefeater:

“The pressure of business means that the critical difference in success is how people are led. Emotional intelligence is critical in the way Beefeater aspires to lead. The rigour and thoroughness of this work are impressive. We now need to capitalise on this work by turning it into a pragmatic programme that drives the business forward at the front line.”

● GEETU ORME IS FOUNDER AND MANAGING DIRECTOR OF EI (UK) LIMITED, A COMPANY THAT SPECIALISES IN EMOTIONAL INTELLIGENCE. SHE CAN BE CONTACTED ON 01625 890220; EMAIL: geetu@eiuk.com. STEVE LANGHORN WAS CHANGE DIRECTOR OF BEEFEATER BEFORE MOVING ON TO A ROLE MANAGING CHANGE PROJECTS ACROSS WHITBREAD. HE CAN BE CONTACTED BY EMAIL ON STEVE.LANGHORN@whitbread.com.

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Raymond Holloway, Learning and Development Manager

Will Vernon, Operational Change Manager (now Strategic Planning Manager)

Andrew Gammage, Service Quality and Process Manager

Julian Woodall, Head of Learning and Development

Research assistance was provided by Paul Gandy and Kate Davies of Ei (UK) Limited.

Note

1. The measure of emotional intelligence referred to in this article is the Bar-On EQ-i (Emotional Quotient Inventory); the short-form descriptions of the Bar-On EQ-i used in the Whitbread project are shown in box 2. The EQ-i is one of the most valid and reliable tests of EI; its author is Dr Reuven Bar-On. The Bar-On EQ-i is a trademark of Multi-Health Systems, Toronto (www.mhs.com). In the UK, accreditation is provided by Ei (UK) (www.eiuk.com).

