

# Leadership 500 Excellence Awards

PRESENTED BY

HR.com



Jan Green

CPAs / ADVISORS



Company Name: Blue & Co., LLC  
Program Name: Building Leaders Program  
Program Director: Jan Green  
Address: 12800 N. Meridian Street Suite 400  
Carmel, Indiana 46032  
Call: 317-428-6822  
Email: [jgreen@blueandco.com](mailto:jgreen@blueandco.com)  
Visit: [www.blueandco.com](http://www.blueandco.com)



1

Leadership Excellence Rank

Midsize Companies Category

## Risk Takers

Our editorial team interviewed **Jan Green, Learning and Development Officer** from Blue & Co., LLC, at the Leadership Excellence Awards this past April. Following are the excerpts from an exclusive interview.

### Tell us about your overall leadership vision and mission specific to the *Building Leaders* program.

In 2010, Blue & Co., LLC decided to put the spotlight on leadership development and found the best way to grow internal leadership talent would be to tap into the knowledge of our directors and create a best-in-class leadership program for managers and senior managers.

In December of 2013, Blue celebrated the completion of the second offering of the *Building Leaders* program. The business purpose of this advanced leadership program was to build a pipeline of leadership talent within Blue to assist in meeting the Firm's succession management objectives and help develop the leadership and business development skills of our managers and senior managers.

We also wanted to deepen participants' knowledge and understanding of Blue's business strategy, gain clarity about the role and expectations of being a director/partner, and build strong peer relationships across the Firm – which assists in retention, creates a one-firm mindset, and is a catalyst for future business development opportunities.

### What makes your program unique and different?

What makes this program so unique is our custom approach, variety in delivery methods, and involvement of many leaders to facilitate the program. *Building Leaders* is an internally-designed, 18-month long program that is face-paced, extremely challenging, engaging, and customized to the needs of our leaders.

Interested participants apply through an application process and are selected for the program by Blue's Executive Committee (the Firm's top governance). The *Building Leaders* program is led by Blue's Learning and Development Officer. The philosophy regarding leadership development is that it "takes a village," and is all executive leaders' responsibility to grow the leadership talent within the Firm. So although the program is facilitated by the L&D Officer, the program includes active participation by more than twenty individuals including Blue's Executive Committee, other key directors, and special guest speakers.

*Building Leaders* is not a canned program purchased off the shelf from an external training vendor. The content of this program was designed in-house based on Blue's needs in the area of leadership development. The program is continuously being evaluated and updated to stay current and support the Firm's vision and direction.

### How many people do you impact every year with this program?

Since the start of the *Building Leaders* program in June of 2010, twenty-six people have graduated. Twelve leaders graduated in December, 2011, and fourteen leaders

# Leadership 500 Excellence Awards

PRESENTED BY

HR.com



graduated in December, 2013. Of these graduates, fifteen individuals have been promoted (twelve to senior manager and three to director – our highest level). Four of the graduates have received the distinguished Ron Blue Award, and two have received outstanding leadership awards in the community.

#### **How long does it take to complete this program?**

The program is eighteen months long and consists of twenty-five different development opportunities. After the participants graduate from the program, they move into the *Building Leaders Alumni Group*, which unites all graduates for further leadership development, networking opportunities, and fostering relationships.

#### **How is this program delivered, both online and in a classroom?**

As this program is made up of individuals from eight different offices, it is important for these participants to meet face-to-face and get to know each other. Most of these meetings are conducted in-person,

in a classroom format; however, we also include experiential learning, video conference meetings, small group meetings, one-on-one mentor meetings, and accountability groups for project work. Most of the content is created internally; however, there are a few other instances when we hire external experts to work with the group to keep the learning fresh and exciting.

#### **How do you measure success and ROI of your program?**

A variety of measurement tools have been incorporated into the program. Assessments are conducted by the participants at the start and completion of the program. 360 degree feedback is included in the program, and a follow-up 360 is delivered one year after the program. In the first *Building Leaders* program, we measured business development numbers prior to the program and the amount of increase during the *Building Leaders* experience. The group doubled their business development efforts while participating in the program. In addition, many of the sessions include Levels 1, 2, 3 and 4 feedback

(Kirkpatrick's Four-Level Evaluation) to continuously verify we are meeting the needs of the participants. One aspect that is harder to measure, but very easy to witness, is the growth in confidence of the graduates as a result of the program.

Increased confidence is demonstrated through individuals stepping up to take on assignments, demonstrating leadership-in-action, modeling the way, displaying more confidence internally and with clients, coaching others, providing delicate feedback, etc.

### **What is your area of expertise with regard to leadership training, such as teamwork, execution and frontline managers?**

We are an accounting firm, so we are very strong in providing technical development to our employees at all levels. Blue recognizes that great leaders must have a balance of strong technical competence, as well as solid skills in leadership awareness, understanding, and application. This program was designed to build the following aspects of leadership development:

- 1) Developing individual awareness and commitment to a personal leadership philosophy.
- 2) Developing influencing skills in areas such as one-on-one discussions, small group meetings, and large group presentations.
- 3) Understanding group dynamic issues (both positive and challenging), learning how to be a leader among other leaders, and when to follow, encourage and support.
- 4) Dealing with conflict and challenging situations.
- 5) Working outside one's comfort zone.
- 6) Teambuilding, relationship building, experiential training, and philanthropic work.
- 7) Problem solving and working through issues as a team – peer-to-peer coaching.
- 8) Execution of large scope projects from the initial design process to final presentation.
- 9) Linking accountability to every aspect of being a leader.

### **What are the key takeaways from your program? How does this program impact the organization?**

During the last six months of the program, each *Building Leaders* group is tasked with identifying an innovation project (or two) that will improve the Firm in some capacity. Three projects have been completed that have had significant impact on the Firm.

#### 1) Practice Management Software

In partnership with an IT expansion committee, the group researched, evaluated and recommended a new practice management system for the Firm. As a result of this project, the Firm adopted a new practice management system that impacted every aspect of how it operates: time entry, billing, expense reports, client reports, firm financial reporting, accounting, etc. This system is being used today and will be used for years to come.

#### 2) Navigate your Career at Blue

The second project was to improve Blue's coaching culture and also help employees learn and take charge of their careers. The *Building Leaders* group designed an online coaching system that unified the process of goal setting, facilitated creating meaningful development goals, and improved the frequency and effectiveness of coaching practices across the Firm. This project also introduced a new tool to Blue – the "Individual Development Plan (IDP)" – for all employees, and is now a standard practice across the Firm. During the 2013 performance management process, 96.4% of all employees had clear goals and coaching conversations with their coaches/managers regarding these goals.

#### 3) Growth Strategy for Blue

The final project was to evaluate the Firm's strengths, competition, market, trends, challenges, economy, and create a growth strategy for the Firm. This included recommendations of existing niches to expand, new niches to move into, strong markets for development, what to avoid, when to build, buy, or hire, etc.

### **What impact does your program have on users?**

The best way to summarize the impact of the program is to hear from the participants of the program:

- *This program ignited me to take power and ownership over my career and clearly define the essence of my legacy. (Michelle)*
- *This program was an incredibly challenging and rewarding experience. The opportunities led to growth, both personally and professionally. (Eric)*
- *Each session was an experience that allowed me to build relationships with future leaders at Blue that will last a lifetime. (Kyle)*
- *This program challenged and pushed me to limits I didn't know I could achieve. (Steve)*
- *The visibility to Directors across each of the offices is a rare and invaluable experience to individuals at this point in our careers. (JT)*
- *This was one of the best investments I've made in my career. (Sara)*

### **What are the next steps for this program?**

In June of 2014, the graduates of both *Building Leaders* programs met for a full day of training as the newly-formed *Building Leaders Alumni Group*. They had an outstanding day of teambuilding, problem-solving, building relationships, and giving back to the community. These alumni meetings will take place two times a year, and each new group of graduates will join the *Building Leaders Alumni Group*.

The next *Building Leaders* program will launch in June of 2015.