

Effective Leadership in a Hybrid World of Work



How Leaders Adapt to a Hybrid Work Environment

Foreword by Dave Ulrich, PhD, Rensis Likert Professor at the Ross School of Business at the University of Michigan and partner at The RBL Group

These past few years have changed the way we think about our relationship with work. We have seen millions of workers, from the technician on the shop floor to the finance manager in the high-rise office building, reevaluate the role that work plays in their lives; often seeking greater workplace or work schedule flexibility to offer workforce personalization. Flexibility can look different based on the nature of the work, the industry, and the worker. Knowledge/office workers may well have more options but even those organizations with predominantly traditional, on-site working conditions are enabling team empowerment when it comes to scheduling and work processes and finding creative ways to support the work-life balance needs of on-site workers.

Many have found remote work to be their key to greater work-life balance. On the other hand, many workers facing the emotional effects of loneliness and isolation want to connect in-person with co-workers and return to the physical workplace but not necessarily on a full-time basis. Enter the hybrid world of work where organizations are experimenting with a variety of options to personalize work in order to attract, engage and retain the talent required to compete today and tomorrow.

The hybrid world of work doesn't fundamentally change what's required to be an effective leader. Even so, leadership practices need to evolve. Leaders must understand the value of talent and their role in managing a hybrid workforce. New mindsets, behaviors, and methods leaders should adopt include:

- Bringing the right people into the organization and on their team
- Coaching with empathy and compassion
- Setting clear performance expectations
- Developing people to improve competence
- Retaining high performers and removing those who don't fit
- Improving employee commitment
- Helping employees have a positive work experience

Because the way we work continues to change, leaders can seize the opportunity to create an inclusive, engaged, and highly productive workplace for everyone. They can help employees:

- Be physically and psychologically safe regardless of where they work
- Find meaning from work by aligning their personal values to the organizational values and business imperatives
- Become better at their jobs by learning and adopting a growth mindset
- Belong by creating an inclusive community where everyone feels valued and welcome

[Gallup](#) finds that the greatest advantages of hybrid work to date are in improved work-life balance, more efficient use of time, control over work hours and work location, burnout mitigation, and higher productivity.

But there can also be challenges. The hybrid/remote work environment can negatively impact mental health and well-being if employees feel lonely, isolated, and disconnected no matter how, where or when they work. Leaders can help mitigate social isolation by building stronger relationships to engage with employees virtually, build trust, develop rapport, and improve psychological safety.

Whether in-person or remotely, rather than talking at team members, leaders need to demonstrate empathy, show curiosity, and listen. They can use simple questions like, “How are you doing? How's your family? What are you learning about yourself?” By listening, leaders can appreciate team members' circumstances. That then prompts leaders to demonstrate their own vulnerability. The pandemic, social justice movements, political upheavals, and geopolitical developments can create a backdrop of uncertainty and anxiety for leaders and employees alike. Leaders need to have the courage to acknowledge the uncertainties and say, “I don't know what this new world of work means. I'm struggling as well.” Transparent vulnerability is not a weakness; it demonstrates authenticity and encourages connection.

Connecting with remote team members can't happen through the old “managing by walking around” approach. Leaders now need to hold frequent, intentional check-in conversations where they can coach and provide real-time feedback. These interactions should be occasions for leaders to build trust by demonstrating:

- Credibility—using their knowledge and experience to be a helpful coach
- Reliability—showing they can be counted on to show up and follow through on commitments
- Intimacy—demonstrating that they care for the person

When leaders demonstrate that they care by providing individualized attention and resources, employees have a better experience. One simple test of great leadership is to ask, “Did an employee leave an interaction feeling better or worse about themselves?” When employees walk away from their interactions with a leader, whether the interaction was a great or difficult conversation, they should leave feeling better about themselves. This means that leaders hold employees accountable through positive caring conversations while also being clear about performance expectations: “I care about you and you have great potential” or “You made a mistake; let's learn from it and continue to improve.”

Effective leaders are able to align the work that needs to get done with personal values of the employees; they can make those connections to mission and purpose.

An *employee value proposition* simply means analyzing the difference between what employees give and what the organization gives back in response. You want those who give a lot to get a lot back. When you achieve a balance between what they give and what they get, you create a value proposition that works.

Personalizing the employee experience first means making it “personal” —caring for each person as an individual, one by one. The second part is tailoring for each person what they need from their job. Ask them, “Where's the place you want to work? What's the activity you want to work on? How can we, as an

organization, be flexible so that you can contribute?” Leaders then give guidance to employees based on how they answer those questions.

Finally, leaders *encourage team members to make a commitment to the organization* through modeling the values and behaviors of the organization, delivering superior business results, and encouraging their connections to apply for open positions and join the team so that they, too, can experience a “great place to work.”

When leaders adapt their skills to deliver a positive experience for each employee, great things can happen, not only for the employee on a professional level but also on a personal level and, by extension, the communities in which they live and the impact that the organization delivers for a variety of stakeholders. Leaders matter more today than ever, not just by their physical presence, but by being meaning makers and role models. By doing so, they are the key to building an inclusive, high-performance workplace for all workers.

Be the leader who builds teams that are a magnet for talent and pay it forward by developing the next generation of leaders. Ultimately, that is how we build the business cultures we desire.

About This Report

The purpose of this report is to explore how organizations can shift their leadership development focus to enabling leaders to support ongoing productivity and engagement in an increasingly common hybrid world of work. We seek to determine if leadership can be effectively developed using a *virtual semi-synchronous leadership development program cohort*. Our research approach included a series of working groups for CHROs, chief talent officers, chief DEI officers, and heads of leadership development and a separate leadership development program for several of their managers conducted in the late summer and early fall of 2022. Each member of a working group was asked to select two or three well-performing “early in career” managers who lead hybrid work teams. These recommended managers then completed a six-week, virtual leadership development program, based on the curriculum and thought leadership from the Ross School of Business at the University of Michigan. The program was hosted on the Udemy Business cohort learning platform and supported by coaches and facilitators and delivered to 100 registered leaders divided into two cohorts. The program incorporated the collective knowledge of and participation of the partners: Udemy Business, The RBL Group, University of Michigan Ross School of Business, ROI Institute and The Conference Board.

The virtual program included assessments and evaluations to capture the program’s overall success following the principles of the ROI Institute’s ROI Methodology. The AI-driven High Impact Learning Analytics dashboard within the Udemy Business cohort learning platform proved to be a significant source of data. Multiple types of data were collected, including measures describing participant engagement in and perceived value of the program; skill development, increased proficiency, and use of skills; and impact of improved proficiency on the business.

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[ROI Institute](#), founded by Jack J. Phillips PhD, and Patti P. Phillips, PhD, helps individuals and organizations evaluate program success. They do this by providing workshops, consulting, coaching, briefings, keynote presentations, publications, and research and benchmarking services. ROI Institute's mission is to develop, refine, and support the use of the ROI Methodology® in all types of applications and settings by building capability in individuals who become Certified ROI Professionals®. In short, ROI Institute helps individuals and organizations show the value of what they do. ROI Institute operates in over 70 countries serving business, nonprofit, government, nongovernmental organizations, educational institutions, and associations.

Introduction

As the way work gets done, where and by whom continues to evolve, organizations are looking to create and maintain ways of working that attract, engage, develop, and retain productive workers who collectively deliver business results. Ways of working cover a spectrum from fully remote to fully on-site with hybrid arrangements bridging the divide. The mix of working arrangements are likely to be fluid for some time as organizations, and the employees they want to attract and retain, experiment with approaches.

Effective leadership has always been a requirement to create a positive employee experience, as well as an inclusive and engaging environment and a productive workforce. That has not changed even as workplaces evolve and embrace at least some level of hybrid work. Yet organizations need to adapt their leadership development practices to prepare leaders for any working environment within the organization, and now with a greater focus on hybrid work-specific skills that empower leaders to promote employee productivity and engagement.¹ The hybrid world of work doesn't fundamentally change what's required to be an effective leader, however certain leadership competencies become more critical to master in a hybrid work environment.

An additional consideration for members of the working groups, given the cost-prohibitive nature of many in-person, traditional leadership development programs, was whether a virtual approach could be as effective as traditional methods, particularly since the need to lead effectively in a hybrid setting requires the mastery of technology that parallels the leadership development program. Another consideration is the need to scale development for leaders faster than traditional methods allow.

A Working Group was formed in the summer and early fall of 2022 to discuss the new or enhanced skills leaders must master to be effective in a hybrid environment and whether the mastery of those skills is on par with more traditional methods. In particular, we sought answers to these questions:

- What leadership skills are required for success in this hybrid work environment?
- Can leadership skills be developed effectively in a virtual cohort learning environment with equal or higher efficacy than traditional in-person approaches?
- What elements of a virtual cohort leadership development program are critical to success?
- What factors contribute to developing sustained behavior change?
- Can a virtual cohort leadership development program deliver demonstrable business impact?

Our approach was to engage human capital leaders in the exploration of what might be required now of leaders in the increasingly common hybrid world of work and to determine if leadership can be effectively developed using a virtual semi-synchronous leadership development program approach. The program incorporated the collective knowledge of and participation by four partners: Udemy Business, University of Michigan, ROI Institute and The Conference Board.

¹ Amy Abel and Rebecca Ray, *2021 CEO Brief: Executive Coaching and the Future of Work*, The Conference Board, November 2021.

Data was gathered from these two workstreams:

1. **Discussion sessions for Human Capital Leaders:** A working group met three times and included members of the Human Capital Center of The Conference Board (CHROs, Chief Talent Officers, Chief DEI Officers, and heads of leadership development). Their focus was to explore how leadership skills may or may not have evolved, what effective leaders may need to do to be effective in a hybrid world of work and whether or not the business impact of more effective leaders can be measured in a virtual program. Data included qualitative data from discussions under “[the Chatham House Rule](#)”, informal polling data, formal survey data and formal presentations by experts in leadership development.
2. **Virtual Leadership Development Program for Managers:** Concurrent with the working group sessions, a six-week, virtual semi-synchronous leadership development program was delivered to 100 registered leaders divided into two cohorts. Designed as a guided learning journey, managers were given the opportunity to learn or enhance a skill in multiple ways (video, readings, discussion threads), and to apply the learning in a structured assignment and then reflect on the effectiveness of their skills application exercises on an individual, small group and live cohort discussion basis. Data included participant preprogram and post program self-assessments, live virtual event and group coaching feedback, sentiment analysis, application week assessments, formal survey data, manager feedback and the insights gleaned from the AI-driven High Impact Learning Analytics within the Udemy Business cohort learning platform.

Insights for What’s Ahead

- **While many leadership competencies are important in every setting, some rose in importance to successfully manage in the hybrid work environment, including interpersonal skills, such as emotional intelligence, empathy, compassion, and self-awareness; giving productive coaching/feedback; and, fostering an inclusive environment.** Leaders should examine and adopt the new mindsets, behaviors, and methods that encompass the skills needed to successfully lead a collaborative and effective hybrid team.
- **Leadership skills can be effectively developed in a virtual learning environment with equal or higher efficacy than traditional in-person approaches.** Elements of a successful virtual learning approach—including pertinent, quality content, an easy-to-use platform, ongoing coaching, an engaging learner experience, clear expectations set in partnership with a supervising manager, and collaboration and conversation with colleagues—can lead to a program design that delivers behavior change, application of skills, and business impact. An effective leadership development program delivered through a virtual semi-synchronous design is not necessarily the least expensive program when considering program fees, the cost of time to complete assignments, and other programming costs; however, our research related to this project shows it can deliver higher returns than traditional in-person leadership programs. In fact, 89.8 percent of respondents in the post-program survey rated *Leading in a Hybrid Work Environment* as effective or extremely effective in providing the ideal elements for such a program. Participants reported improvement in the six skill areas addressed in the program and 42 participants reported an average 15.2 percent increase in contribution to the job based on their perceived improvement in these skills. Depending on the impact that these skills can lead to, the result could be a high return on investment (ROI).

- **Engaging and learning with a cohort, rather than on an individual basis, can increase the effectiveness of leadership development programs.** To realize the best outcomes, organizations should consider approaches to leadership development that foster higher levels of engagement, such as cohort-based learning. Participants who are actively engaged with their cohort are more likely to complete the program, report higher levels of skill mastery and declare a higher commitment to continued development post-program. The level of engagement maximizes the ROI of leadership development.
- **Factors that most contribute to developing sustained behavior change through virtual cohort learning are: quality of the content, ease of use of the platform, and facilitator engagement through coaching, status check-ins, and nudges along the way.** Program success also requires manager involvement prior to, during, and even after the program, as supervising managers are critical to business alignment and enable support while participants strive for proficiency with the skills that matter most.
- **Guided informal learning activities are an effective way for leaders to develop the new leadership skills needed to successfully manage hybrid work teams.** Providing highly responsive, individualized, and structured support, including targeted, continual synchronous and asynchronous support (such as quality videos and tools/templates, online reminders, dedicated coaches, live discussion sessions, and status checks) is critical to success.
- **Measuring the ROI of a leadership development program aligns participant expectations with business objectives and impact.** ROI indicates the extent to which financial resources are used efficiently. Benefits of more effective leadership in an organization include business measures such as productivity, quality, time, employee engagement, customer satisfaction, and any other business performance indicator. According to the ROI Institute, while negative ROIs do occur, leadership development offers an opportunity for some of the highest ROIs. This is because leader behaviors influence team performance, which has a greater effect on business measures than that of the individual. By applying its standard ROI methodology based on feedback and data collected from participants in a *Leading in a Hybrid Work Environment* program, ROI Institute estimates that for every dollar spent on the program there is the potential of returning the dollar investment plus an additional \$3.10.²

The Skills Necessary for Effective Leadership in a Hybrid World of Work

Recent [survey results](#) from The Conference Board show a declining state of employee engagement and well-being that is not solely the result of remote work itself. One third of respondents reported decreased engagement and 37 percent reported lower levels of mental health, regardless of work location. On the other hand, organizations that reported thriving in a hybrid/virtual world displayed six common leadership

² For a detailed explanation of the methodology used to calculate the estimated ROI for the *Leading in a Hybrid Work Environment* program and the feedback data from participants used in the calculation, see the Appendix of this report.

attributes: trust, communication, caring, inclusion, purpose, and agility.³ Yet, many managers struggle to effectively support and optimize their hybrid teams.

Effective leadership in a hybrid environment still requires the time-honored skills many managers have or will need to master; however, certain leadership competencies have become increasingly important in a hybrid work environment. These are: interpersonal skills, giving productive coaching/feedback, fostering an inclusive environment, and leveraging the technology that allows connection and collaboration.

Interpersonal skills

To effectively manage in a hybrid workplace, leaders need to emphasize the core components of emotional intelligence: empathy, compassion, and self-awareness. Leaders who communicate with empathy and compassion build trust and create a culture that encourages employees to share challenges and ask for support.⁴ Establishing psychological safety is vital in all work settings, as is recognizing the importance of better work-life balance.⁵

Giving productive coaching/feedback

Leaders should start by ensuring continued transparency, engagement, and equity across remote and co-located workers. The virtual workplace, and to a lesser extent a hybrid workplace, limits opportunity for employees to organically build professional relationships that can advance their careers. Even in a hybrid model that can include fully remote workers, employees fear that missing out on the benefits of showing up in the workplace, namely visibility and exposure, will translate into limited upward mobility.⁶ To address these concerns, leaders should have regular check-ins with their employees that specifically address employee concerns such as stress and burnout, and offer timely performance feedback. In learning and development efforts, creating a culture that expects managers to take an active coaching role, and establishing a structure that enables them to do so, is critical when employees are sometimes physically isolated.⁷

Fostering an inclusive environment

Levels of engagement and well-being can also decrease due to isolation. For instance, remote workers miss out on positive aspects of co-located working, such as participating in company culture, networking, and socialization. Maintaining an inclusive environment (and benefiting from its impact on retention and performance) is a challenge when some team members are virtual, and others are in person. Leadership development initiatives should reflect this role and support flexibility and inclusion practices while ensuring that managers' efforts are consistent with the organization's broader DEI strategy.

³ Robin Erickson et al., *Reshaping Employee Experience and Organizational Culture*, The Conference Board, June 2021

⁴ Amy Abel and Vivian Jaworsky, *COVID-19 Reset & Recovery: Coaching Leaders into the Future with Empathy and Emotional Intelligence*, The Conference Board, February 2021.

⁵ Amy Edmondson and Mark Mortensen, *What Psychological Safety Looks Like in a Hybrid Workplace*, Harvard Business Review, April 2021.

⁶ Amy Abel, Stacy Starkka, and Vivian Jaworsky, *Using Mentorship to Build Connections in a Hybrid Workplace*, The Conference Board, December 2021.

⁷ Kelly Simmons, *How to Democratize and Sustain Learning in A Hybrid World*, Chief Learning Officer, March 2022.

Leveraging the Technology that Allows Connection and Collaboration

Finally, being an effective leader requires the ability to leverage new and evolving technology platforms designed to improve communication, collaboration, and access to training and digitized platforms.⁸

Leadership Skills Can Be Developed in a Virtual Cohort Approach

Changing Perceptions of Leadership Development There are those who believe that leadership development, particularly for high-potentials, is best achieved via traditional, in-person programs delivered over multiday sessions and at iconic corporate locations. There are, however, several factors driving companies to look for other options or seek to combine the best attributes of multiple approaches.

- Leaders must now demonstrate effectiveness in a variety of work settings (remote, in-person, hybrid) and experience the complexities of doing so while learning in that same hybrid setting
- The rising Millennial cohort of “digital native” leaders find a virtual approach a very comfortable fit for their learning style
- The cost of traditional, in-person programs is often prohibitively high to deliver at scale
- The need to upskill leaders at scale demands the exploration of a virtual approach (albeit synchronous and asynchronous)

Insights from our experience with the *Leading in a Hybrid Work Environment* working groups and training program show that leadership skills can be developed through virtual cohort learning, which has the potential to yield returns equal to or greater than those skills developed through traditional, in-person leadership programs. A total of 83.9 percent of leaders participating in the *Leading in a Hybrid Work Environment* program reported it was effective (55.4 percent) or extremely effective (28.5 percent) when compared to classic, in-person delivery.

A key insight from the working groups and the program is that engaging and learning with a cohort, even a virtual one, rather than on an individual basis, increases the effectiveness of leadership development programs. In our pilot research, participants who were actively engaged with their cohort were more likely to complete the program, reported higher levels of skill mastery and declared a higher commitment to continued development post-program. Managerial support is also critical to learner success. Participants who engaged in a conversation with their managing supervisor about the program were more likely to report skill improvement. Of the 77 participants responding to the pre-assessment questionnaire, 60 percent reported having a conversation with their supervising manager prior to participating in the program. This conversation set expectations for success in the program and is an opportunity to align participation with business needs.

⁸ Julian Birkinshaw, Maya Gudka, and Steve Marshall, [What Leadership Development Should Look Like in the Hybrid Era](#), Harvard Business Review, June 2022.

A Virtual Cohort Leadership Development Program Can Deliver Demonstrable Business Impact

Leadership development, when offered to the right people at the right time and for the right reasons, can provide substantial payoff for the organization as well as the individual. Benefits might include improvement in employee engagement, absenteeism, and retention. They may also include improvements in measures related to productivity, quality, safety, and direct cost savings. A single leadership development cohort may influence any number of measures.⁹

The first step to ensuring a leadership development program delivers business impact is to align the program with specific business measures in need of improvement. From our research we learned from participants what they believe are the most important elements of a powerful virtual leadership development experience. These elements include:

Pertinent Content: Content needs to be relevant for developing general leadership skills as well as those skills required for overseeing hybrid teams. Content needs to be immediately applicable and align to the desired outcomes of the leader and the team. Content areas most mentioned include coaching and feedback, communication, cultural competencies, adapting leadership skills, coaching others to adjust to hybrid environments, keeping employees engaged, and the pitfalls of leading hybrid teams and how to overcome them.

Design for Application: Application projects and toolkits should not only support the learning during the program but also serve as useful resources after the program ends. Ongoing use of newly acquired skills will deliver genuine business impact.

Engaging Learner Experience: This begins with an engaging platform that includes routine coursework, well-facilitated webinars, and time between topics to practice. It also requires case studies, scenarios, and the creation of personas that reflect those with whom leaders will interact. The use of reminders, nudges, post-program support, and accountability will help sustain the use of newly acquired skills.

Clear Expectations: Set clear expectations regarding what participants will learn, what they will do with what they learn, the impact they are expected to achieve, and the support they will receive to succeed. These expectations should be clear in the program objectives and should also be communicated to the supervising manager and other senior leaders. As one participant commented, “The key to anything done regarding leadership is how it is modeled from the top. Setting the expectation of accountability and following through on that is the most important piece. Without that, nothing will change.”

Collaboration and Conversation with Colleagues: An effective virtual, semi-synchronous leadership development program offers a variety of ways in which participants can engage with and learn from each other. Through small-group discussion to collaboration on case studies and

⁹ Jack J. Phillips, Patti P. Phillips, and Rebecca L. Ray, *Measuring Leadership Development: Quantify Your Program's Impact and ROI on Organizational Performance*. New York, NY: McGraw-Hill (2012).

sharing of tools and resources, participants can further their proficiency with leadership skills and, more importantly, expand their professional network to leverage for support in the future.

Closing Thoughts

The results of this virtual program revealed that leadership development skills can be effectively developed in a virtual semi-synchronous learning environment with equal or higher efficacy than traditional in-person approaches analyzed using a similar approach. Elements including pertinent content, an engaging learner experience, clear expectations set in partnership with supervising managers, and collaboration and conversation with colleagues can lead to a program design that delivers behavior change, application of skills, and business impact. We have shown in this study that this can be done in a virtual environment. Some organizations may wish to have a traditional, in-person program that helps senior leaders build relationships and there will probably always be a place for those programs. However, the ability to build core skills for effective leadership in a variety of today's work settings can be offered through targeted, cost-effective, virtual programs at scale.

Factors that most contribute to developing sustained behavior change through virtual learning are quality of the content, ease of use of the platform, and facilitator engagement through coaching, status check-ins, and nudges along the way. It also requires manager involvement prior to, during, and even after the program, as supervising managers are critical to business alignment and enabling support while participants strive for proficiency with skills that matter most.

An effective leadership development program delivered through a virtual semi-synchronous design is not necessarily the least expensive program when considering the program fee, the cost of time to complete assignments, and other programming costs; however, it can deliver higher returns than those of traditional in-person leadership programs. The forecast ROI in this case study represents the potential return for the organization if participants continue to use the skills they learned to improve important impact measures in the organization.

Acknowledgments

We would like to acknowledge the significant contributions of the CHROs, chief talent officers, chief DEI officers and heads of leadership development at The Conference Board's Human Capital Center to the generation of insights during our three working group sessions and selected and supported managers from their respective organizations to participate in this unique leadership development program.

We appreciate the key contributions from Dr. Mike Barger, Professor of Business Administration, Michigan Ross School of Business; Kate Sweetman, Co-Author of *Reinvention: Accelerating Results in the Age of Disruption*; and Karen Beckford, Moderator, Udemy Expert Network, for their involvement as coaches and thought partners during the program. In addition, we thank the village that it took to execute this project: Sue Todd, Austin Davis, Ann Cheney, Justin Mass, Helen Senos, Jacquie Lawson, Rosie Bellavia, Jeanine Baron, David Reisinger, Theresa Chiamonte, Heather Ishikawa, Patricia Gallagher, Lindsey Legget, Stef Miller; Joe Hanson, Dustin Schwanger, Dr. Jack Phillips, Caroline Hubble, Kylie McLeod, Evan Seidner, Melissa Brown, and Andy Vance, Malala Lin, Aryeh Becher, Barbara J. Isenberg, Chuck Mitchell, and Sarah Churchville from the talented teams at Udemy Business; the Ross School of Business at University of Michigan; ROI Institute and The Conference Board.

Finally, we want to thank all the managers who chose continual development as a leader by participating in this project, candidly sharing their experiences and challenges with others; trying new ways to lead themselves, others and their teams; and committing, as a leader, to make the teams they lead better and the workplace they oversee a great place to work.

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Appendix

Leading in a Hybrid Work Environment Program, an ROI Analysis

The research design: a virtual leadership development program for managers

Concurrent to the working group sessions, a six-week, virtual semi-synchronous leadership development program was delivered to 100 registered leaders who were divided into two equal cohorts. The program incorporated the collective knowledge of and participation by four partners: Udemy Business, University of Michigan, ROI Institute and The Conference Board. This appendix provides an overview of the ROI analysis of business impact.

Program structure

An immersive six-week program, the *Leading in a Hybrid Work Environment* program was designed to provide participants with the ability to learn or enhance skills, apply that learning to practical business situations and receive feedback on and reflect upon their ability to effectively demonstrate the behavior. The program, at a glance, is captured in Figures 1 and 1a below.

Figure 1

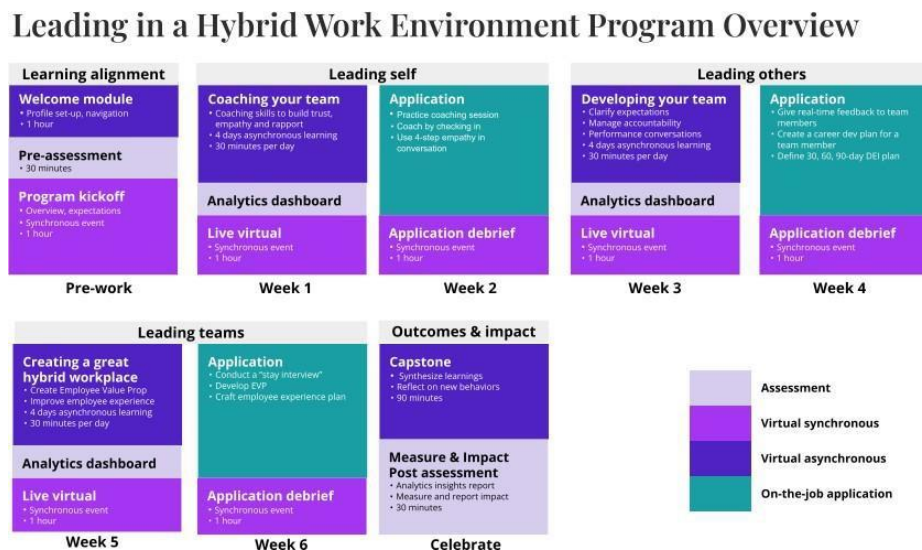
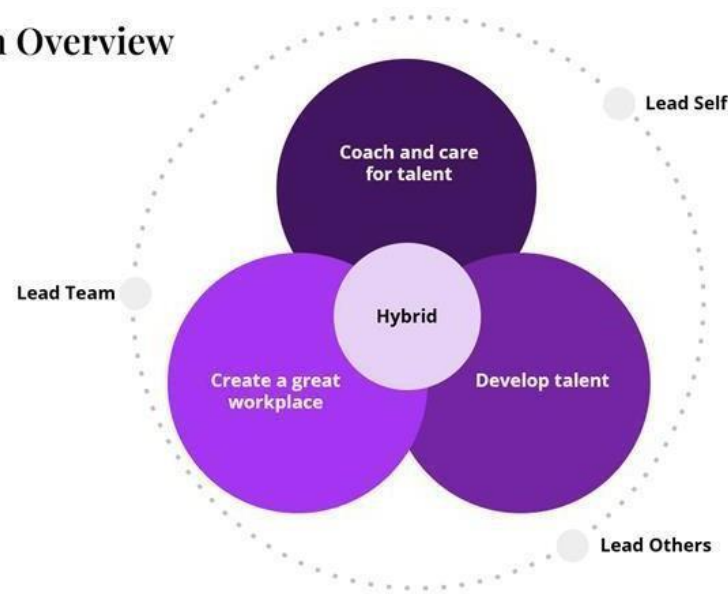


Figure 1a

Program Overview



Components of the program included:

- **Program kickoff:** The program included a 45-minute kickoff session to introduce the program's facilitators, present learning objectives and discuss expected outcomes. This also enabled learners to meet each other virtually and to clarify what they should expect throughout the learning experience.
- **Guided learning journey:** Real-world experts and faculty from University of Michigan Ross School of Business guided learners through the program to provide an instructor-led experience in a virtual environment. The cohort also included a certified moderator who provided daily coaching and encouragement to learners.
- **Live, virtual events:** A faculty member delivered a synchronous, live, virtual event every week to help provide context to the week's topics and dive deeper into the week's learning.
- **Micromodal learning:** The program blended synchronous learning for peer discussion with the flexibility of on-demand, asynchronous microlearning to reinforce proven principles of effective adult learning. The program delivered short, relevant, practical content, guidance for application, opportunities for discussions, and post-program toolkits. Participants watched videos and read relevant materials, participated in discussion forums, completed action-learning projects, attended synchronous, virtual check-in conversations in small groups and with larger cohorts, and created future action plans.
- **Application and coaching:** The program alternated between skill-building and skill-application activities over a two-week period to practice critical leadership skills areas known to impact retention, performance, and engagement in a hybrid work environment:
 - Coaching and caring for hybrid teams (including self-awareness, empathy)
 - Developing hybrid teams (including accountability and performance conversations)

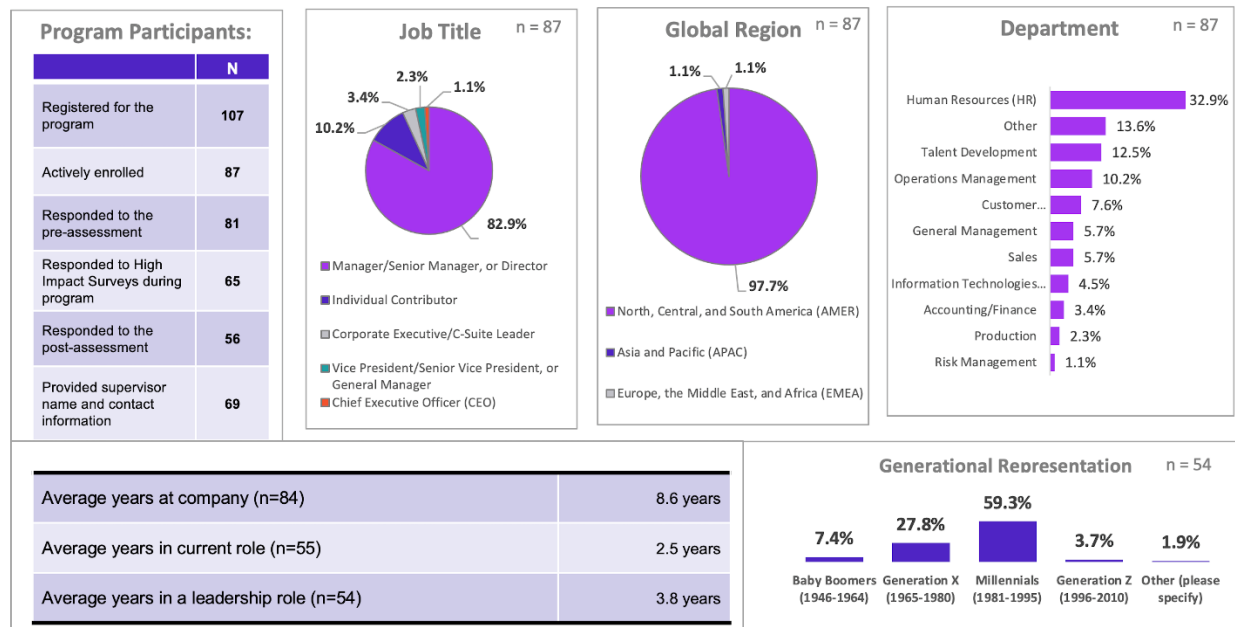
- Creating a great place to work for hybrid teams (including team member development, feedback conversations, and creating development and DEI action plans for implementation)
- **Technology and analytics:** The program was hosted on the Udemy Business cohort learning platform. Powered by AI and Natural Language Processing, the platform's algorithms provide data insights to help better predict behavioral change, provide actionable insights, and drive business impact.
- **Program evaluation:** Assessment and other applicable data collection efforts were built into the program to determine the program's overall success.

Participant demographics

Participants included managers, senior managers, and directors, making up 82.9 percent of our sample. This evaluation draws from an overall count of 87 actively engaged participants and a range of 56 to 81 assessment and survey respondents from organizations located predominantly in the Americas. Each participant was recommended by their organization; more than half were business leaders and many were in human resources. Almost all had several years of experience with an average of 8.6 years at their current company and an average of 3.8 years in a leadership role. Nearly 60 percent of the participants identified as members of the Millennial generation and almost one third as members of Generation X. See Figure 2 below for additional detail.

Figure 2

Participant Demographics



Data collection

Data were collected prior to the launch of *Leading in a Hybrid Work Environment* using a detailed questionnaire. During the program, data were collected using the High Impact Learning Analytics dashboard within the Udemy Business cohort learning platform, application week surveys, polling during the live sessions, feedback during the live sessions, and at the end of the program, through a detailed questionnaire. An additional follow-up questionnaire will be administered 60 days post-program to assess sustained use of the skills and business impact. Due to course design, the primary source of data were the participants themselves. Figure 3 summarizes the data collection methods used for evaluating *Leading in a Hybrid Work Environment*.

Figure 3

Data collection methods

Data Collection Methods	Types of Measures			
	Engagement in and Perceived Value of the Program	Skill Development and Increased Proficiency	Application of Skills Learned	Business Impact
Preprogram questionnaire		X		X
High-Impact Learning Analytics Dashboard	X	X		
Application Week Assessments			X	
Polling during live sessions	X			
Live event/group coaching feedback	X	X	X	
Post-program questionnaire	X	X	X	X

Given the open-enrollment nature and variety of possible business measures, the estimation process was deemed the most feasible technique to isolate program effects. Because the duration of the program was only six weeks and the opportunity to measure real business impact was limited, it was determined that an ROI forecast using a utility analysis approach would provide the best evidence of economic value of the program.

A 60-day follow-up questionnaire will be administered to capture sustained use of skills, job contribution, and business impact.

Sources of data for program evaluation

The program included assessments and other data collection efforts (such as surveys) to gather data for determining the program's overall success. More importantly, the evaluation set out to identify the guideposts most helpful for pursuing implementation of a virtual semi-synchronous leadership development program. Following the principles of the ROI Institute's ROI Methodology, multiple types of

data were collected, including measures describing participant engagement in and perceived value of the program; skill development, increased proficiency, and use of skills, and impact of improved proficiency on the business.

The primary source of data were the participants themselves (multiple self-assessments, preprogram and post-program questionnaires, application week surveys and work products, polling during the live sessions, feedback during the live sessions) as well as the AI-driven High Impact Learning Analytics dashboard contained within the UdeMy Business cohort learning platform. Data were augmented by observations from the human capital leaders who participated in the Working Group Sessions, providing feedback from the supervisors of the participants.

Measures were taken to ensure the most objective data and the most conservative assumptions given the design of the program, the nature of the data collection, and the time limitations to demonstrate results of this virtual semi-synchronous learning program. An additional follow-up questionnaire will be administered 60 days post-program to assess sustained use of the skills and business impact.

Figure 4 below provides a look at the types and formats of content that participants were expected to master in weeks one, three and five, which were the learning weeks.

Figure 4

Sample module elements

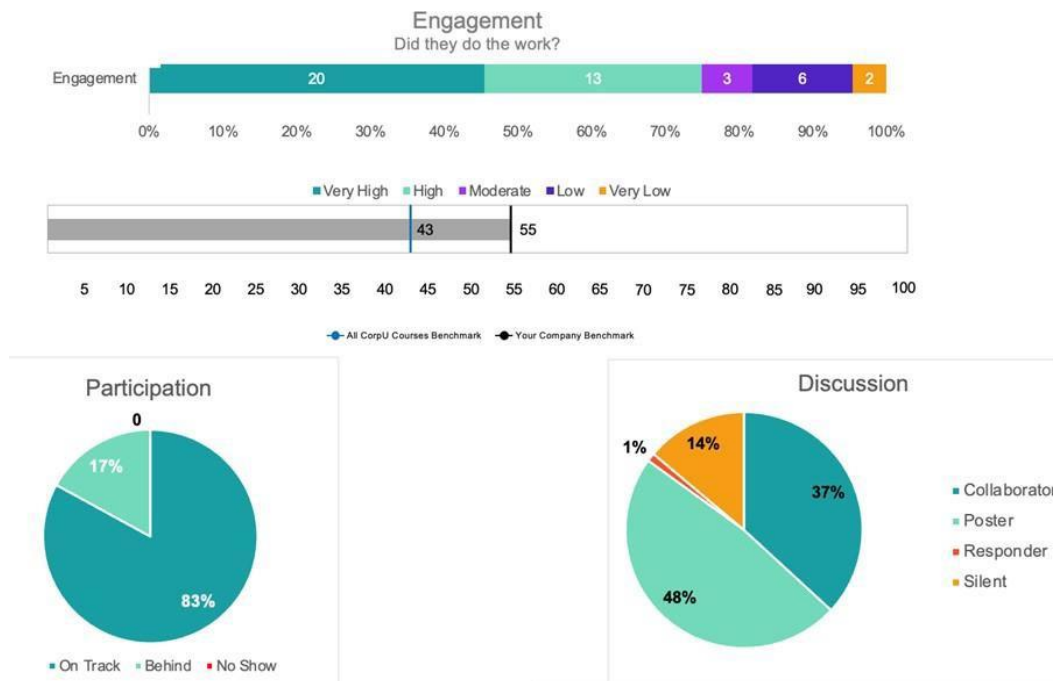
The screenshot displays a learning management system interface. On the left, a blue sidebar lists course activities under the heading 'read & download'. The activities include: 'Introduction to delivering a positive employee experience (1 Estimated Minute)', 'watch: Impact and definition of employee experience (5 Estimated Minutes)', 'watch (OPTIONAL): Bridging customer experience with employee experience (4 Estimated Minutes)', 'reflect: Believe, become, and belong current state (5 Estimated Minutes)', 'watch: Believe: Help employees find meaning at work (3 Estimated Minutes)', 'watch: Become: Help employees learn and grow from work (3 Estimated Minutes)', and 'watch: Belong: Help employees have good relationships at work (5 Estimated Minutes)'. The main content area features a slide titled 'Employee Experience Metrics' with a sub-heading 'Indicators of Overall Employee Experience'. The indicators listed are: 'Productivity: Ratio of output/input (revenue/employee; profit/employee)', 'Well being: Surveys (satisfaction to skill to engagement to meaning)', 'Retention of key employees: Retention or turnover of key employees', 'Reputational data: Public reports, cloud insights', and 'Observation/Perception: Intuition, perception'. At the bottom of the slide, there are buttons for 'Notes', 'Save for Later Add to your backpack', and 'MARK COMPLETE'. On the right side of the interface, a vertical list of user avatars is visible, indicating a live session or discussion forum.

Findings

Success with these elements led to a course in which participant engagement remained high throughout the six-week program, as measured by the High Impact Learning Analytics dashboard within the UdeMy Business cohort learning platform. Using an algorithm to determine the degree to which participants completed parts of the course and engaged in discussion forums resulted in an engagement score¹ of 55, which exceeds the benchmark of 43 for all the UdeMy Business cohort learning courses. Engagement by participants was driven in part by the relevance of the content.

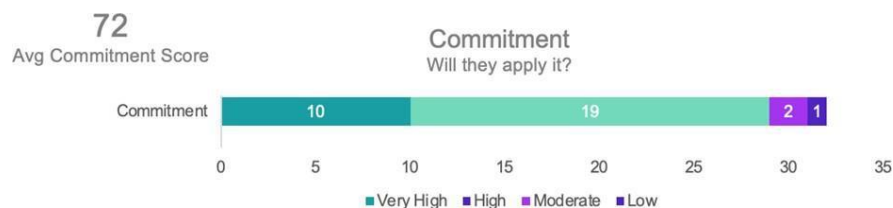
Figure 5

The program's success was also evident in participants' commitment to apply what they learned, as



indicated by the algorithmically generated commitment score² of 72, which is slightly higher than the average commitment score across all cohorts at 70.75.

Figure 6

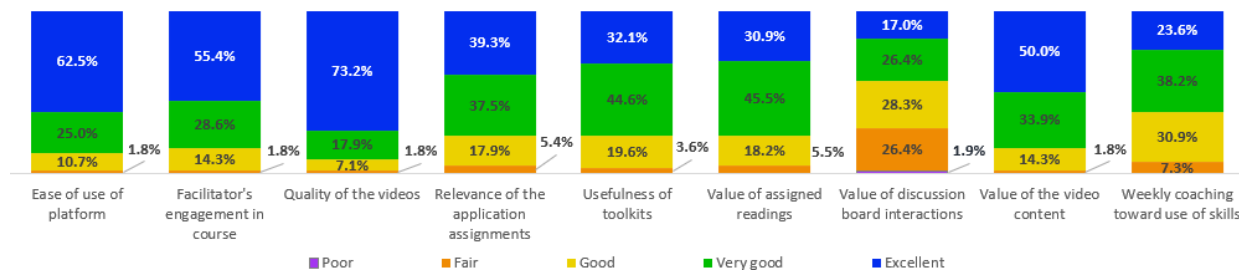


Participants also perceived the platform, quality and value of the content, and facilitator engagement in delivery of the content as positive. Figure 7 shows participant ratings for all of the nine key course elements. As illustrated, 50 percent or more of participants rated the following four elements as Excellent:

1. Quality of videos (73.2 percent)
2. Ease of use of the platform (62.5 percent)
3. Facilitator's engagement in the course 55.4 percent)
4. Value of the video content (50 percent)

Figure 7

Rate each of the following elements of the Leading in a Hybrid Environment course. (n=56)

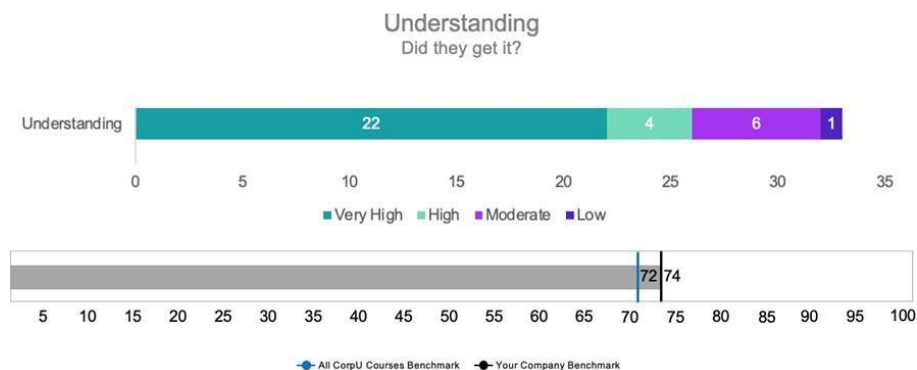


When asked specifically how participants perceived content delivery for *Leading in a Hybrid Work Environment* compared to content delivered in-person, 84.6 percent rated it as effective to extremely effective. The average completion rate of online learning is 5 percent to 15 percent, according to some reports. *Leading in a Hybrid Work Environment*, a virtual semi-synchronous leadership program, resulted in an 86.5 percent completion rate.

Skill development and increased proficiency

Engagement during the six weeks enabled participants to develop and master skills important to leading in a hybrid environment. The average understanding score³ of 74, as measured by the High Impact Learning Analytics dashboard indicates that participants' knowledge acquisition exceeds all of the Udemy Business cohort learning courses benchmark of 72.

Figure 8



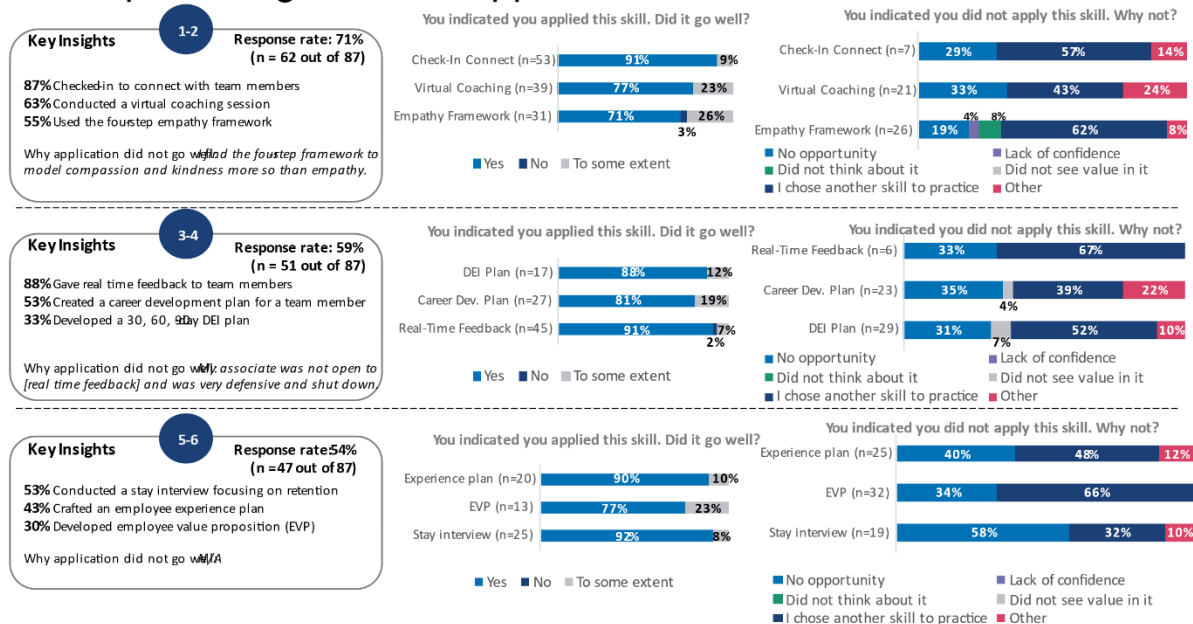
Through practice and the use of the support tools, participants perceived themselves as improving in proficiency in most of the skills. Guided action learning, and targeted and continual support nudged participants to practice and enabled them to improve. Evidence of improvement in developing core leadership skills—such as building trust and rapport through routine check-ins, managing performance through real-time feedback, and improving employee experience through effective stay interviews—was evident in the biweekly practice opportunities.

Figure 9 shows the nine skills learned over the course of the program and the percentage of participants reporting practice with those skills during the biweekly practice sessions. Additionally, it shows the extent

to which participants agree the practice went well and the barriers preventing them from practicing the other skills taught during the week.

Figure 9

Participant Progress with Application: Week 1-2, 3-4, & 5-6



Biweekly practice, coaching, status checks, and live discussion boards contributed to improved leadership skills as measured by the preprogram and post-program assessment. Using a 0-to-11-point scale, participants rated themselves on their level of ability with each of the nine skills prior to beginning the program. Upon completion of the program, they scored themselves again. While self-assessment alone is not ideal when measuring capability, due to the nature of the program and the low response from supervisors on the pre-assessment, it was decided to rely only on participant perception for this initial evaluation.

Forty-seven participants completed both the preprogram and post-program assessment. One of the skills, conducting a meaningful stay interview, was the least practiced during the program due to timing of the content. However, it was the skill for which participants rated themselves most improved with a 35.5 percent increase. It was also the skill area that participants reported themselves as least proficient in the pre-assessment. Performing check-in conversations to connect with team members was one of the most practiced skills and was rated as second most improved (17.4 percent improvement). The skill reported as least improved was creating a career development plan with an increase in ability of 5.1 percent. As shown in Figure 9 above, 22 percent of participants responding to the weekly application survey indicated they did not practice this skill for reasons other than those listed. Reasons for not applying it included incorporating the activity into the check-in conversation, that they already work with team members to create career development plans, and that they already apply this process in their department.

The first step to ensuring a leadership development program delivers business impact is to align the program with specific business measures that need improvement. Due to the program's open enrollment, the design team was limited in their ability to frame an alignment process to help participants define measures specific to their organization. A predetermined list of business measures was presented to

participants. Participants selected up to three measures that needed to improve and that could improve with the skills taught in the program over a brief period.

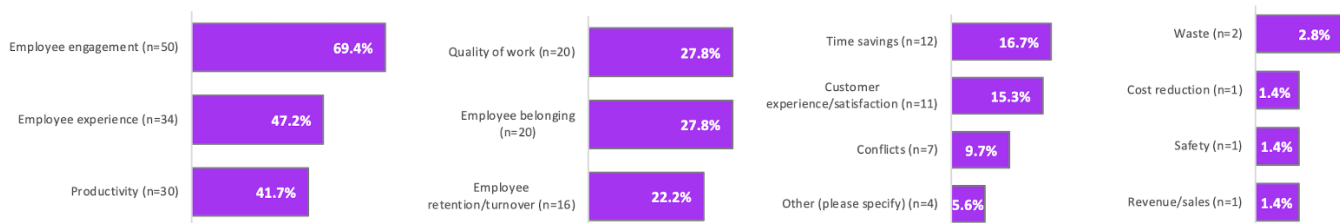
Figure 10 presents the measures in the order of frequency that they were selected by 72 participants responding to the question. As shown, employee engagement was selected by most participants (69.4 percent), employee experience and productivity were second and third most selected (47.2 percent and 41.7 percent, respectively.)

Figure 10

Business measures in need of improvement as selected by participants

Business Measures in Need of Improvement as Selected by Participants

Of the following business measures, select up to three that you hope to improve by participating in this program. (n = 72)



Upon conclusion of the six-week program, participants were asked to report on improvement in their selected measures resulting from use of the skills they learned in the program. Given the limited time between the start date and the end-of-program assessment, there was minimal expectation that much improvement in the selected measure could occur, although some participants indicated they believed that there had been improvement in their selected measures. Thirty-eight of the 56 (67.9 percent) participants completing the end-of-program questionnaire indicated improvement had occurred in their selected measures.

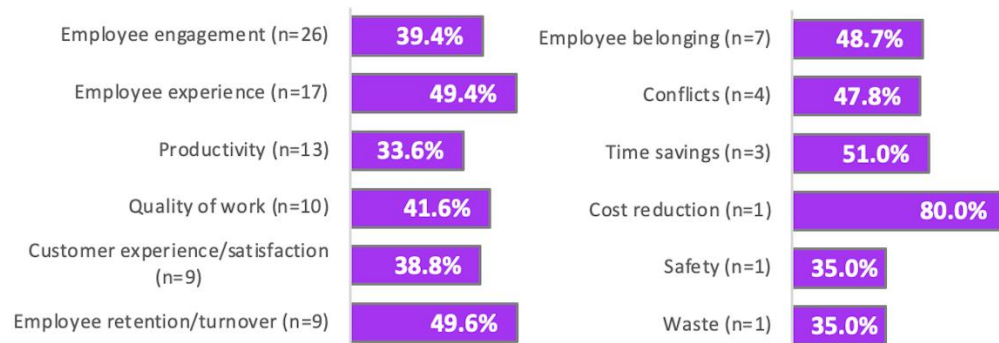
The measure where most indicated an improvement was employee engagement with 26 respondents reporting an average 39.4 percent improvement. Second was employee experience with 17 respondents reporting a 49.4 percent improvement. One participant reported the most improvement in cost reduction. Figure 11 presents the improvement in measures reported by participants.

Figure 11

Improvement in selected measures as perceived by participants

Improvement in Selected Measures*

As a result of you using the skills you learned in the program, identify as a percentage how much the measure has improved to date.



*Respondents could provide a rating between 0% and 100% improvement for up to three measures.

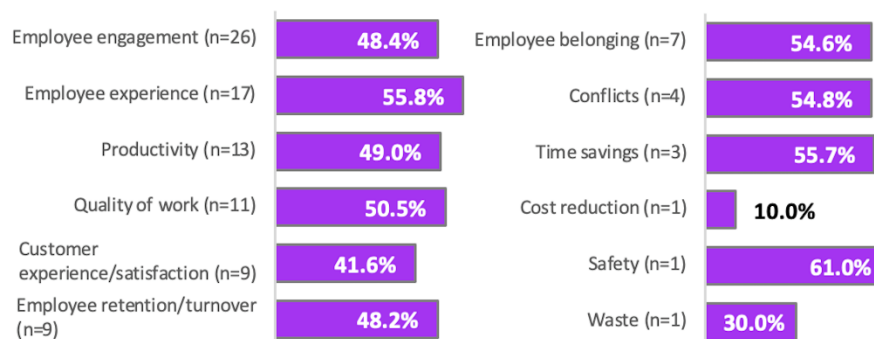
Participants were also asked to estimate by how much their selected measures would improve over the next 12 months as they continue using the skills learned in the program. Thirty-seven of 56 participants (66 percent) responded to this question. As shown in Figure 12 below, respondents expect employee engagement to increase 48.4 percent over the next 12 months as they continue applying skills learned in the program. Employee experience shows an expected increase of 55.8 percent, and productivity with an expected improvement of 49 percent.

Figure 12

Projected 12-month improvement in business measures

Improvement in Selected Measures in 12 Months

Identify, as a percentage, how much you estimate the measure will improve in the next 12 months as you continue to use the skills you learned.



Return on investment

Return on investment (ROI) indicates the extent to which financial resources are used efficiently. Its long history makes it one of the most fundamental and useful measures of economic value added to the business. While there are many measures of economic value, [the basic formula](#) used to assess economic return on any type of program or project compares the annual net monetary benefits of a program to the cost of the program. In formula form, ROI is:

$$\text{ROI} = \frac{\text{Benefits} - \text{Costs}}{\text{Costs}} \times 100$$

Benefits are the annual improvement in business measures such as productivity, quality, time, employee engagement, customer satisfaction, and any other business performance indicator. Improvements in these measures are the consequence or impact of changed behavior or new actions or implemented processes. Analysis of this type requires a process supported by standards that ensure reliability. The following is a brief description of the ROI Methodology and the standards, or 12 Guiding Principles, that support the analysis.

One key standard requires a step to isolate the improvement in business measures to the program—ideally using experimental design (control group), trend line analysis, or mathematical modeling. When these techniques are not feasible, a conservative estimation process is used. Improvements in business measures are converted to profit if an increase in sales is the benefit, and cost savings or cost avoidance for other measures like quality, time, turnover, safety incidents, etc.

Standard values are often available for improved measures and are used to convert the measures to money. Internal experts might also be available to provide values. Fully loaded labor cost (salary plus benefits) is sometimes used as the basis for converting time savings measures to money. Other data conversion techniques are used when standard values are unavailable.

Because actual impact data and their respective monetary value were unavailable from the cohort, the approach used to determine the ROI of *Leading in a Hybrid Work Environment* was based on utility analysis. [Utility analysis](#) is useful in forecasting the ROI when business data are not present. Input into this analysis includes:

- Percentage of the job requiring the specific skills learned in the program
- Increased proficiency in the skills learned
- The program's attribution to the improvement in proficiency, adjusted for error
- Team member salary, including benefits factor
- Program cost

Figure 13 shows the specific questions in the post-program questionnaire that provided the data for the ROI forecast. An increase in job contribution assumes that improvement in business measures will follow. Therefore, the increase is the basis for forecasting the ROI. This increase is converted to money using fully loaded labor costs (salary plus benefits) and compared to the cost of participating in the program.

As described earlier, 87 people were actively engaged in the program. Fifty-six participants responded to the post-program questionnaire, including the questions in Figure 13. To keep estimates conservative, those responses that appeared to be extreme in comparison to the group (e.g., 100 percent improvement in proficiency) were not used in the analysis. This left us with data from 42 respondents. As shown in Row E in the table below, participants perceive a 15.2 percent increase in their job contribution. Based on participant perceptions of what they gained from the program and how much their job requires the skills, this suggests that participants are contributing 15.2 percent more to the job.

Figure 13

Increase in job contribution resulting from improved proficiency as reported by participants (n=42)

During <i>Leading in a Hybrid Work Environment</i> , you learned nine new skills.	
• Conduct an effective virtual coaching session • Perform a check-in conversation for the purpose of building trust and rapport • Demonstrate empathy for team members • Provide meaningful real-time feedback • Identify skills team members need to succeed in the future • Embedding Diversity, Equity, and Inclusion (DEI) into team culture • Conduct a meaningful stay interview • Strengthen employees' commitment to the organization • Improve employee experiences	
A. Overall, how much of your current job requires the use of all nine skills?	75.2%
B. Overall, how much more proficient are you with these skills since participating in the program?	45.9%
C. Given that other factors can influence proficiency in skills and capability, how much of your gain in proficiency is due to your participating in this program?	56.5%
D. How confident are you in the estimates you just provided?	77.9%
E. Contribution to the organization (A x B x C x D = E)	15.2%

To complete the analysis, we estimated that the average fully loaded labor cost of those participating in the program is \$135,000 (Line F). Multiplying this by the job contribution results (Line E) in an average monetary benefit of \$20,520 (Line G).

Participants and their respective companies were not charged for this program. However, under normal circumstances, there would be a fee. Leadership development programs that include content delivery, coaching, and access to resources for up to one year [can be expensive](#), particularly when customized to the specific needs of an organization and involving a large cohort. Also, the process used to evaluate the

programs requires an accounting of all program costs which would include fees, time in the program, time required for assignment completion, and other activities associated with the program. For purposes of this forecast, this is the fee of a virtual program (\$2,000 per participant) plus the assumed cost of time to participate and complete course requirements (\$3,000 per participant).

Figure 14 completes the analysis by multiplying the increase in job contribution to an assumed fully loaded salary and program cost. This results in a possible ROI of 310 percent. This ROI suggests for every dollar spent on *Leading in a Hybrid Work Environment*, the program has the potential of returning the dollar investment plus an additional \$3.10, based on self-reported improved proficiency with the skills.

Figure 14

ROI calculation

Contribution to the organization (A x B x C x D = E)	15.2%
F. Estimated salary \$100,000 plus 35% benefits factor	\$135,000
G. Average monetary benefits to the organization (E x F = G)	\$20,520
H. Estimated fully loaded costs (registration fee, participant time to complete coursework, materials, etc.)	\$5,000
ROI = [(G – H) / H] x 100	310%

What Is an Acceptable ROI?

ROI calculated for typical short-term investments in talent development, such as *Leading in a Hybrid Work Environment*, assumes a payoff in the first year. The actual percentage of investment returned depends on the magnitude of the problem/opportunity, program costs, and program design. Whether the ROI is acceptable depends on the objective set for it. ROI objectives for noncapital investments typically range from 10 to 25 percent. Although, 0 percent (break-even) is sometimes used, as are targets based on client expectation.

While negative ROIs do occur, leadership development offers the [opportunity for some of the highest talent development ROIs](#). This is because leader behaviors influence team performance, which has a greater effect on business measures than that of the individual.

Instructor-led, in-person leadership development programs target a limited number of people at one time. Scaling for contribution to the business is expensive and difficult. Typical virtual learning programs contribute little in terms of business impact because they are typically not designed to do so.⁴ In contrast, virtual cohort learning, such as *Leading in a Hybrid Environment*, is better designed to deliver application, impact, and a positive ROI than other programs—and at scale.

Comparison to Other Approaches to Leadership Development

While there are many case studies describing the actual ROI of leadership development based on improvement in business measures, Figure 15 compares a small number of leadership programs for which the ROI is calculated using a similar approach to the utility analysis used in this research. ROI forecasts indicate the potential return an organization can receive for investing in a program. ROIs vary for many reasons. Comparing ROI of one program to that of another in isolation of other measures and context is insufficient. It is important to get the full story before making a judgment about a program on ROI alone.

Figure 15

Leadership development ROI forecasts using similar approaches to utility analysis

Program	Delivery	Participants	Cost per person*	Forecast ROI**
<i>Leading in a Hybrid Work Environment</i> <i>Open Enrollment</i>	Virtual, cohort	87	\$5,000 est.	310%
Executive Leadership European Bank ⁵	In-person	20	€3,000	33%
Manager Development Electric Utility ⁶	In-person	22	\$950	327%
Introduction to Supervision US Federal Government ⁷	In-person	20	\$1,368	150%

*Costs are fully loaded including assessment, design, development, implementation (including participant time in the program), and evaluation costs. Purchase costs replace design/development costs.

The estimated cost for *Leading in a Hybrid Work Environment* is based on best information available including participant time to complete the six-week program requiring 5 to 7 hours of coursework per week. Organizations did not pay for participation in *Leading in a Hybrid Work Environment*.

**The ROIs listed are forecasts based on increased job contribution and do not represent the actual ROI based on the improvement of business measures due to the program. Salary used to forecast the ROI for *Leading in a Hybrid Work Environment* is estimated based on the best information available. An ROI forecast based on increased job contribution is more credible than a preprogram forecast in that participants have had a chance to experience and apply the content, thereby increasing their proficiency. It does not, however, replace the importance, value, and reliability of an actual ROI.

Intangible Benefits

Intangible benefits are those benefits not converted to money as well as benefits beyond those targeted. *Leading in a Hybrid Work Environment* generated a variety of additional benefits, including:

- Feedback and support
- Personal Improvement
- Better understanding

Sample comments from participants about how they benefited from the program:

“Hearing what other leaders of people are faced with was eye opening. Also, Karen is a fantastic program manager, facilitator, and coach. Her messages to me in the platform board and in Zoom chat really helped build my confidence.”

“Learning from leaders outside of my organization has widened my perspectives.”

“I am currently up for promotion to a people manager, and my team will be virtual. This course has provided me with valuable tools and really helped me know where my strengths and areas of improvement are so that I can work on those in the coming months leading to promotion.”

“Getting a different perspective on effective leadership. I've largely learned by watching my boss, and it was good to learn additional tools and talk about them with her, and also be exposed to the rest of the cohort and hear stories from different sectors and industries.”

Opportunities for Improvement

While *Leading in a Hybrid Work Environment* proved a successful program, as with all programs, there are opportunities to improve. Some areas noted for improvement include:

- Consider leaders' workload as it can delay engagement in the program
- Find ways to use the discussion board more effectively
- Give participants an opportunity to network and collaborate on projects
- Incorporate smaller group and cohort-based interaction
- Offer more variety in how the material is delivered—hear other voices
- Focus the program more on hybrid working
- Engage participant supervising managers earlier in the process to get their support
- Align the program with specific business measures important to the participants

For a full discussion of the underlying approach or to learn more, please visit www.roiinstitute.net or download resources, including case studies and application guides at www.roiinstitute.net/leadership_in_a_hybrid_world.

¹ The Engagement Score is a composite of two measures. The first tracks completion of all course activities. The second evaluates how learners post, respond, and engage with the content through the discussion forum activities. An index from these combined measures contributes to the Engagement score.

² The Commitment Score is created through a composite of two measures. The first measure comes from a participant's indication on a post-course survey of their intentions to continue practicing new skills. The second is computed using Natural Language Processing to analyze and score the statement they write about how they intend to follow through with using the skills and knowledge.

³ The Understanding Score is measured by a combination of how well participants believe they could explain it to someone else and an analytic algorithm that calculates their comprehension.

⁴ Cindy Huggett, Jack J. Phillips, Patti P. Phillips, and Emma Weber. *Designing Virtual Learning for Application and Impact: 50 Techniques to Ensure Results*. Alexandria, VA: ATD Press (2023).

⁵ Jack J. Phillips and Patti P. Phillips, *The Consultant's Guide to Results-Driven Business Proposals: How to Write Proposals That Forecast Impact and ROI*. New York, NY: McGraw-Hill (2010), p. 241-242.

⁶ Jim Graber, Gerry Post, and Rick Erwin, *Using ROI Forecasting to Develop a High-Impact, High-Value Curriculum*. In Jack J. Phillips, *Measuring Return on Investment, Volume 2*. Alexandria, VA: ATD Press (1997), pp. 113-128.

⁷ Mary L. Broad, Lisa Szymanski, and Alex Douds, *Built-In Evaluation*. In Jack J. Phillips, *Measuring Return on Investment Volume 1*. Alexandria, VA: ATD Press (1993), pp. 55-70.

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