Kansas City, Missouri

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Client Story

Embracing Virtual Learning at H&R Block

H&R Block is committed to elevating talent and culture as a key to its successful future. It's making good on that commitment by making an investment in its leaders so they can unleash the potential in their associates. The organizational effectiveness team at Block was looking for a way to ensure leaders had a common language to use—especially during performance conversations. "We have a set of Behaviors, or commitments to each other and how we'll work together," explains Catherine Stewart, director, organizational effectiveness. "One of those Behaviors is Straightforward. We commit to give and seek actionable feedback. Another of our commitments to each other is to be Determined—to achieve high goals, sharing ideas freely and taking actions to win. That said, we want people to communicate more effectively and to advance conversations instead of struggling through them because they don't have the proper skills. We also know these skills can be taught and learned."

Catherine Stewart

The challenge was how to deliver this skills training to leaders across thousands of H&R Block locations around the world. The company's extremely large seasonal workforce added another layer of complexity. Although they were facing a daunting challenge, the H&R Block team partnered with Blanchard® to develop a viable solution.

"We were already familiar with the SLII® model. Then our Blanchard partner introduced us to the new virtual training delivery option," says Stewart. "I'll admit I was a little nervous about it at first, but it has worked out perfectly for our company. With such a widely dispersed workforce, it's not possible for everyone to come to our Kansas City headquarters for face-to-face training. The virtual design meets all of our needs—it's beautiful, solid, and interactive. It maximizes the capabilities of a virtual classroom with fishbowl activities, videos, and breakout sessions, and it mimics the face-to-face design perfectly. We are confident and proud to offer it to our learners."

The virtual delivery option works so well, it is even used for people based in Kansas City who could easily attend a

blanchard®

face-to-face session. "We looked into a blended solution for our local associates, but ultimately we wanted the training experience to be consistent for every participant, no matter where they were located. Virtual delivery accomplishes that," says Stewart.

Another advantage to the virtual delivery is the diversity of participants in each session. Opening enrollment to all leaders creates sessions filled with people from every level of management and from many different locations. The diverse blend of attendees adds a richness to the experience while it builds community among all participants.

Stewart, organizational effectiveness consultant Donna Sloan, and senior organizational effectiveness analyst Sara Shepherd all became certified to facilitate SLII®. They recruited team mates from other departments in human resources to also become certified and formed a team of twelve facilitators. The design of the program consists of six parts—a launch session, two learning sessions, and three practice sessions. Either Sloan or Stewart delivers the one-hour launch. The other five sessions have two facilitators each, with one teaching the first hour and the other teaching the second hour.

"Using the virtual delivery option is great not only for participants, but also for facilitators. They don't even have to be in the same room with each other to lead their sessions. Instead of two people training for an entire day, they do it in two-hour sessions. That way the energy level and engagement remain high, and I think it improves the learning experience," says Sloan. Additionally, since each facilitator is certified to deliver all of the content, they can cover for each other if schedules change. "It can be a juggling act to schedule all six parts of the SLII® program a year in advance," says Sloan, "but the facilitators act as a community and reach out to each other if they need to make changes. They work together to make sure every session is covered."

Donna Sloan

Sessions are offered monthly and scheduled for each fiscal year. The open enrollment sessions require a minimum of eight participants and maximum of eighteen, because the design uses breakout rooms and everyone needs to participate. In the third practice session, participants are introduced to the master tools available on Blanchard Exchange. These include worksheets to help with goal setting, conversation starters for planning one-on-one meetings with team members, and checklists for assessing the effectiveness of communications, as well as various articles and videos.

Support at the Highest Level

The importance of leadership training is evident at the highest levels at H&R Block. "Tiffany Monroe, our new chief people officer, will go through the entire program. She doesn't want just an executive summary—she wants to have the same experience as our other leaders. That indicates a true commitment to learning, investing in our associates, and making our talent a core competitive advantage," explains Stewart.

Karen Orosco, senior vice president, US Retail, is one of H&R Block's most vocal advocates. "Karen leads our largest business unit," says Stewart. "She isn't just an advocate—she is a walking, talking SLII® leader. She expects all of her leaders to put SLII® skills into practice, too." Last fall, Orosco noticed the rhythm of SLII® training for her division was a little off track, so she added five more sessions to the schedule to accommodate leaders who hadn't yet been trained. This is remarkable because fall is a key preparation period leading up to tax season.

"To have the training embraced at this level in the organization signifies to everyone that we are dedicated to all of our leaders using SLII® skills to improve communication and performance. It is even built into the onboarding plan, so every new field leader gets trained within their first year at Block," says Stewart.

Keeping SLII® Skills Top of Mind

Sara Shepherd helps keep the SLII® language alive

throughout the organization in a few creative ways. She produces "SLII® Spotlights," articles that feature stories about how recent SLII® graduates are putting their skills into practice. "I ask people to share the best thing they learned, what surprised them, and how SLII® helps them interact better with colleagues and teams.

Sara Shepherd

The stories are a fantastic way to show specific examples of real work. And they are conversation starters—they get people talking, sharing ideas, or asking each other for help," says Shepherd.

Also, on the first day of each month, Shepherd emails an SLII® tip to people who have completed the course to reinforce their learning and help them integrate it into everyday practice. "The SLII® tip is a simple and elegant way to keep the learning top of mind for our leaders. I offer one element at a time and include the SLII® model for reference. For example, in one email I reminded leaders to focus on recognition and in another I highlighted directive behaviors," explains Shepherd. The samples below show how easy it is to continually communicate with leaders and reinforce their learning.

Hello situational leaders,

Welcome to your monthly **SLII Tip!**

Remember: **Recognition** *is 1 of the 8 key factors that drive others' engagement in their work. How will you inspire others today?*

Use this tip to continue having those effective supportive conversations!

Hello situational leaders,

Welcome to your monthly **SLII Tip!**

Effective situational leaders use 7 key directive behaviors. Need to narrow it down? **Goal setting** *and* **showing and telling how** *are the 2 most important directive behaviors.*

Once you feel comfortable diagnosing and using the correct style, the next step is learning how to have an effective supportive conversation.

What's Next?

With the SLII® training schedule in place, H&R Block has added two other programs to extend the learning throughout the organization. "We offer the Self Leadership program to individual contributors at H&R Block. The 45-minute online session gives associates the skills and SLII® language to use with their leaders to ask for the proper amount of direction and support they need. People on both sides of the conversation now have a common language and the right tools to improve communication," says Shepherd.

The Coaching Essentials® training program is available to H&R Block leaders who have completed SLII® training.

This program is delivered face to face in Kansas City to help leaders take their skills to a new level. Shepherd says, "We link the skills from Coaching Essentials® to the S3 leadership style in SLII®—it's the perfect way to help leaders go beyond performance management to actually coaching their associates." Integrating coaching with SLII® skills helps leaders have meaningful conversations that create connection, increase trust, and help team members perform at their highest levels."

The Road to Success

Delivering leadership training in a virtual environment has been a successful initiative for H&R Block, and they've learned much along the way. "Changing the way you train people can be uncomfortable, but don't be intimidated," Stewart says. "You just have to start. Start small if you have to, but start. We moved from face-to-face training to virtual delivery by starting slowly and then gaining momentum. The response has been so positive that now we are delivering other kinds of leadership training virtually."

It also helps to make sure learning is integrated back into the daily flow of business and work. Shepherd says, "We initiated sustainment activities like sharing success stories through the online newsletter and offering monthly tips for putting skills into practice. These are constant reminders about how people are working better with their teams by using SLII® skills. And we also continue to remind people of the incredible resources they have at their fingertips through Blanchard Exchange."

Using SLII® skills has become part of the culture at H&R Block. "We've been training this model for a long time, but I still love the aha moment participants have when they realize they need to use a different leadership style for each person—and that their style will need to change with every project or task that the person is working on. It's a real light bulb moment!" says Stewart.

H&R Block reports that their net promoter scores for SLII® training are very high. They are confident that through SLII® and its virtual training design they will continue to develop leaders who will strengthen empowerment and accountability to unleash the potential of their associates.

Enable leaders at every level to become the ultimate agents of progress and transformation for your organization. Visit us at www.blanchard.com to learn more.