Learning to Lead- A CTO Leadership Onboarding Program

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Background & Goals

In academic clinical research, staff are frequently promoted to leaders based on their subject matter expertise and individual contributor success. Despite championing internal promotions, there is little leadership training to aid with their transition. The Clinical Trials Office (CTO) at the University of North Carolina Lineberger Comprehensive Cancer Center (LCCC) frequently promotes internal talent (80% of leadership hires within the last 10 years). Yet, LCCC lacked a leadership onboarding program, relying on managers to learn on the job with informal guidance from seasoned peers.

The short-term goals of this project were to develop a comprehensive and engaging leadership onboarding program to provide new and seasoned leaders with tools, vocabulary, resources, and skills to effectively support their teams. As good management of staff is often associated with reduced rates of turnover, the long-term goals of this project include increasing both staff retention and satisfaction.

Solutions & Methods

A 20-week leadership onboarding program was developed consisting of asynchronous learnings and weekly 1-hour virtual discussion groups (**Figure 1**). Covered topics range from daring to lead to having a greater impact, incorporating leadership guidance from experts (e.g., Brené Brown to Liz Wiseman, respectively) (**Table 1**). Each week leaders watch 1-2 hours of YouTube recordings (median individual recording length: 9 minutes, range: 1-80 minutes) (**Table 2**). These recordings are complimented by handouts, tools, and online leadership skill assessments. LCCC-specific learnings are sprinkled throughout the sessions (e.g., repositories of CTO job descriptions, key LCCC Cancer Center Support Grant (CCSG) documents, and LCCC recordings on the center's history) (**Table 3**). The asynchronous model was selected due to its sustainability in an office where multiple leaders infrequently join simultaneously. To preserve the benefits of cohort-based learning, each week leaders reflected on their learnings within a CTO-wide workbook (**Figure 2a**). As new leaders join LCCC, their peer's reflections are reviewed as they add their own thoughts to this living document (**Figure 2b**). Each new leader is assigned a buddy each week to lead their discussion group. When multiple leaders start simultaneously, larger discussion groups are formed.

Figure 1. Leadership Onboarding Program Format

Asynchronous Learning | Self-Reflection | Discussion Groups

YouTube Videos

PowerPoint Presentations

Self Reflections Recorded into CTO-Wide Workbooks

Virtual Discussion Rooms

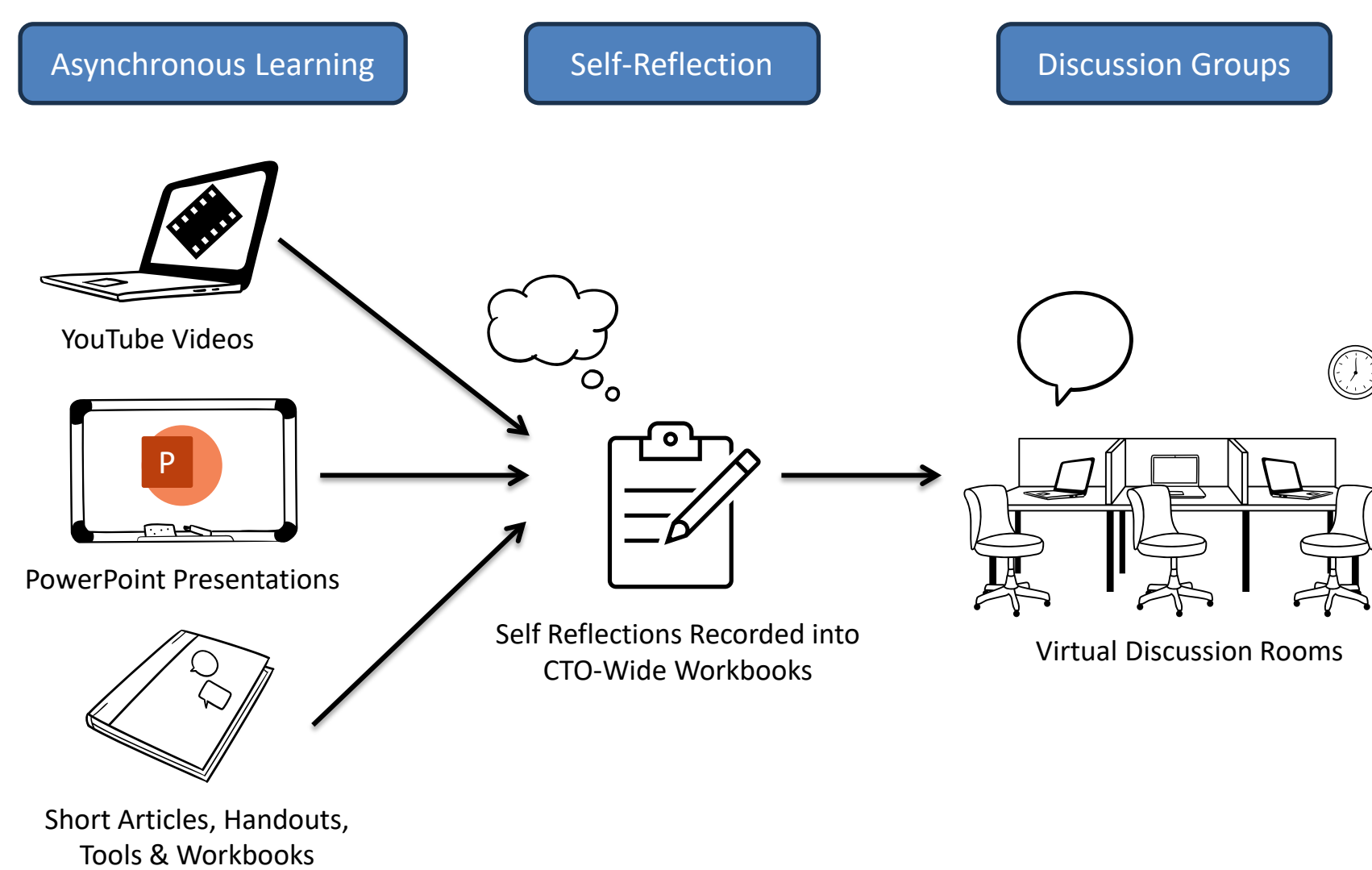Short Articles, Handouts, Tools & Workbooks

Figure 1. A Microsoft Team group was created for the leadership onboarding program with weekly folders containing the learning material. Each week's schedule included YouTube content amounting to 2-10 videos with a median recording length of 9 minutes (range: 1-80 minutes). On some weeks, these videos were complimented by PowerPoint Presentation readthrough slide decks prepared by the CTO Executive Director covering topics such as tips for 1:1 meetings, research on remote teams, tools for establishing expectations, research on the power of showing gratitude for your team, and methods to encourage critical thinking. The presentations were intentionally short (a median of 5 slides, range: 1-15, outlier: 29) and were designed to be quick tools/references. The longest slide deck was a more comprehensive review of UNC Lineberger CCSG infrastructure and organizational structure created for Program Leaders by the Associate Director, Administration. Several short articles were sprinkled throughout the weeks, giving a mix of media to target all learner types. After completing their weekly asynchronous learning assignments, leaders were then asked to reflect on their learnings by answering self reflective questions in the leadership onboarding team's workbook. Their answers are viewable to all participants in the program including future cohorts. Finally, weekly discussion groups were held between discussion group leaders and participants. An initial cohort of 25 participants (all of the current CTO leaders) went through the program together as a single large discussion group. As new leaders have been onboarded since, the weekly reflections act as asynchronous discussion group leaders (each assigned a consistent week) to discuss their weekly reflections. The consistent assignment of weeks allows current leaders to discuss their favorite topics with incoming leaders and to meet 1:1 with their incoming peers.

Solutions & Methods

Table 1. Leadership Onboarding Program Weekly Agenda

Week	Topic
1-2	General Onboarding
3	General Manager Onboarding
4	Culture of Gratitude
5	Leading Your Team
6	Managing Remote Employees & the Importance of Connection
7	Emotional Intelligence
8	Diversity, Equity, Inclusion & Belonging
9	Hiring & Interviewing
10	Onboarding
11	Dare to Lead[1]
12	Best Practices as a Leader
13	Change Management
14	Crucial Conversations & Conflict Resolution
15	Having a Greater Impact
16	Project Planning & Delegating
17	Building Trust & Respect
18	Effective Communication Skills
19	Time & Energy Management
20	Cancer Center Support Grant (CCSG)

Table 1. A 20-week program giving introductions into different leadership philosophies from UNC resources and New York Times Bestselling Author's publicly available content.
[1]Brown, Brene. *Dare to Lead*. Vermilion, 2018
[2]Patterson, Kerry, et al. *Crucial Conversations*. McGraw-Hill Contemporary, 2002.·

Figure 2. CTO Reflection Workbook

A

Week 7- Emotional Intelligence

Name	Role	Answer
1. What is one strategy to increase your emotional intelligence that resonated with you?		
2. Did it surprise you to learn that the higher you go in an organization, the more emotional intelligence matters?		
3. Did it surprise you that EQ is a better predictor of success than IQ?		
4. What is one EQ skill that you think that you are particularly good at?		

Table 2. Example Content- Week 5

Week 5- Leading Your Team Content

- Learn about the Dunning-Kruger Effect and why we think that we are better at things than we actually are in "Why incompetent people think they're amazing- David Dunning" (5:07): https://www.youtube.com/watch?v=pOLmD_WVY-E

- Watch Saba Imru-Mathieu talk about how "Leaders Who Coach are Creating Better Workplaces, and So Can You" (20:03): https://www.youtube.com/watch?v=ypKRJ0IPP-k

- Listen to Cy Wakeman talk about working with the willing: "When to Let an Employee Go" (10:34): https://www.youtube.com/watch?v=OaE-cVn5dgw

- Listen to Cy Wakeman talk about "Dealing with Difficult Employees" in reference to their change management skills (4:20): https://www.youtube.com/watch?v=c4QijZBetcY

- Watch "Superstars vs Rock Stars: Inspire Your Team to Do the Best Work of their Lives" (21:45) to learn about the differences between superstars and rock stars and how having both of them on your team is important: https://www.youtube.com/watch?v=3oChxm4eUbM

- Watch "Career Conversations- LIT Videobook Snippet" (0:48) to get an idea of how to have productive career conversations: https://www.youtube.com/watch?v=g_NPRomuIFQ

- Read the article "Three Powerful Conversations Managers Must Have to Develop People" to learn about how to have productive career conversations: https://review.firstround.com/three-powerful-conversations-managers-must-have-to-develop-their-people

- Take "Managing a Diverse Team" through Carolina Talent (1:20:00): https://hr.unc.edu/carolinatalent/
  - Take the Self-Awareness Inventory Quiz

Table 2. Example content from Week #5: Leading Your Team.

B

Example Responses to Question #1: "Stay in your lane; Exploration"; "Identify my emotional state"; "Asking what instead of why"; "Asking thoughtful questions"; "Trying to understand the why"; "Asking what instead of why"; "Be curious and ask thoughtful questions"; "Finding opportunities to better understand and therefore control my emotional response"; "Asking what instead of why"; "Don't try to change reality but instead change mindsets"; "What instead of why"; "Understanding the "what" - what do you know for sure"

Example Responses to Question #2: 100% of respondents indicated no. Some additional information provided: "Not surprised but wish this lesson had been emphasized earlier in my schooling & career training"; "Not surprised, focus on working with others and how we handle our relationships is important for growth"; "Relationships are at the core of leadership/management and require EQ"; "Not surprised but now knowing this I'm wondering if companies/institutions place as much emphasis as they should on this? How much training do exec leaders get in terms of emotional intelligence?"; "No, but the opposite of what you are taught in graduate school"

Example Responses to Question #3: 86% No, 6.67% Somewhat, 6.67% Yes. Some additional information provided: "It definitely makes sense and holds true in the world I've witnessed"; "EQ allows us to communicate, motivate, and connect better with others"; "When you can do this, you can better lean on the intelligence and expertise of others to tackle an obstacle. So, you don't need to be the smartest person in the room, but it helps when you can bring all the smartest people together and focus their energy towards a common goal"; "Yes, but then realizing that you need that base IQ to be in the organization in the first place made sense"; "Not surprising, but interesting to see the information supporting this."

Example Responses to Question #4: 66.67% Empathy; 20% Self-Awareness; 6.67% Motivation; 6.67% Self-Regulation.

Figure 2. CTO Reflection Workbook

Figure 4. A shared workbook was created in Microsoft Teams with questions for each onboarding leader to answer weekly. Furthermore, the leaders were asked to reflect more on the content from the previous week, answering additional questions. The idea behind having leaders also re-focus on prior week, was to help put gained knowledge into longer term practice. All answers included the learner's name and title, so that leaders could learn more about one another, and so that future onboarding leaders get to benefit from the reflections of past participants in the program. The goal was to allow leaders to benefit from the thoughts and experiences of their peers, while also creating a on-demand program for the spread out onboarding of new members of the leadership team.

Table 3. Example Complementary Materials

Type of Material	Example	# Spread Through Program
Tool	Crucial Accountability[1] Card https://cruciallearning.com/crucial-conversations-book/	11
Guidance Document	Guidance Document on Roles/Responsibilities of Your Administrative Assistant	2
Guide	Radical Candor[2] Quick Start Guide https://www.radicalcandor.com/wp-content/uploads/2021/11/Radical-Candor-One-Pager.pdf	14
Workbook	Daring to Lead[3] Workbook https://brenebrown.com/resources/dare-to-lead-read-along-workbook/	4
CCSG Documents	Clinical Protocol & Data Management (CPDM)	4
CTO Infrastructure Documents	Job Descriptions	Dependent on # approved
In-Person Connection	Meet & Greet with Someone in the CTO that You Would Like to Meet	3
Shadowing	How to Conduct a 1:1	1
Articles	3 Powerful Conversations Managers Must Have to Develop Their People https://review.firstround.com/three-powerful-conversations-managers-must-have-to-develop-their-people/	4
Online Leadership Quizzes	https://adamgrant.net/quizzes/think-again-quiz/	7
Challenges	30-Day Multiplier[4] Challenge https://thewisemangroup.com/challenge/	1

Table 3. Most of the YouTube videos content was developed by leadership coaches who had their own associated websites with additional material, content, quizzes, tools and guides. As a result, participating leaders were referred to this additional publicly available content, directing them to specifically to the most relevant content. For onboarding leaders were asked to review UNC Lineberger-specific relevant content including CPDM and Protocol Review and Monitoring (PRMS) CCSG documents, job descriptions, standard operating procedures (SOPs), work instructions, policies, and other resources. Finally, several in-person and virtual touchpoints were scheduled including shadowing, meet-and-greets, and new leader celebrations.

[1]Patterson, Kerry, et. al. *Crucial Accountability*. McGraw-Hill Contemporary, 2013.
[2]Scott, Kim. *Radical Candor How to Get What You Want by Saying What You Mean*. Pan Books, 2019.
[3]Brown, Brene. *Dare to Lead*. Vermillion, 2018.
[4]Grant, Adam. *Think Again: The Power of Knowing What You Don't Know*. Viking, an imprint of Penguin Random House LLC, 2021.
[5]Wiseman, Liz. *Multipliers*. Harper Business, 2017.

Outcomes

Figure 3. CTO Vacancies, Growth, Attrition & Re-staffing

"When I became a manager, the Clinical Trials Office did not have an onboarding program and provided no leadership training. The new leadership onboarding program has been a great addition. Not only does the program cover a range of topics and issues that new leaders face and provide tools to help us succeed in our leadership roles, but also, it has given us the opportunity to get to know each other better, share common challenges, and learn from each other." –CTO Assistant Director

"The 20-week leadership onboarding program provided a structured and supportive environment to learn, grow, and build relationships with other leaders. The topics were relevant and informative, and they sparked great conversations. I looked forward to the meetings each week!" –CTO Assistant Director

"The Leadership Onboarding Program was a gamechanger for me even though I have been a part of the organization for several years. Through this program, I was able to learn a lot about myself, peers, and Lineberger. I feel I am better able to serve staff having gone through this program. ." –CTO Manager

"The leadership onboarding program at UNC LCCC was excellent, and eye-opening. I truly enjoyed each of the topics and content provided for self-review and discussion. It encompassed several techniques that I took for granted over the years, they had a textbook basis. Some of the topics cemented knowledge acquired through practice over the years in my leadership roles, others provided the baseline for the proper way to handle issues/conflicts, change management, and to steer conversations, discuss processes, and guide people in the right direction with a positive outcome. I feel that this program truly made a difference in my leadership journey." –CTO Director

"The leadership onboarding program enabled us as leaders to dedicate time towards development and understanding of key factors to improve our leadership skills not just at an individual level but office wide. I greatly appreciated the dedication to fine tuning our skills and diving deeper into improving our own management styles so that we can better meet the needs of our staff. The opportunity to discuss each weekly topic with our leadership peers was instrumental in working towards applying what we were learning." –CTO Manager

Twenty-four CTO leaders have completed the onboarding program with 3 additional leaders enrolled. Current CTO leaders were included in an initial joint discussion group. All leaders provided positive feedback on the program. Seasoned leaders reported enjoying their participation, indicating the program created space for their professional development, provided them with the vocabulary to describe their current expertise, and taught them many new concepts/skills. New leaders reported that they developed foundational skills because of participation. >80% of leaders named the leadership onboarding program as a top 2023 CTO success.

Lessons Learned & Future Directions

Feedback noted that the course lacked education on the day-to-day workings of CTO leaders within each functional group and that leaders had a strong desire to learn more about their peers. Adjustments will be made to the program to address this gap. This will include day-in-the-life panels from current leaders. Two unexpected outcomes of the course were: 1. the connection the program created between leaders within different functional groups creating a desire for regular continued connection points through professional development activities, and 2. the ties the program created to LCCC's mission through education on LCCC's history and the CCSG.