A VALUE ADD: SHADOWING AND ROTATIONAL PROGRAMS

Mia Mulrennan

TIPS, TOOLS & INTELLIGENCE FOR DEVELOPING TALENT

CAREER DEVELOPMENT
A VALUE ADD: SHADOWING AND ROTATIONAL PROGRAMS

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I would love to be able to tell you an inspirational, true story that goes something like this: As a long-standing talent leader, industrial and organizational psychologist, and executive coach, I have been a focused champion and diligent creator in consistently building and developing shadowing opportunities and rotational programs wherever I have worked. Instead, here is the absolute, authentic, hard-earned truth: Most of the shadowing and rotational programs I have been tasked to build have been immediate knee-jerk response projects—meaning that they were built in direct response to filling the gap of lacking rotational or shadowing programs, all while the company I was working with was simultaneously motivated and focused on not losing high-potential talent.

Through it all, I learned the benefits—almost near necessity in today’s fast-paced business world—for both the organization and employees. For talent development professionals, it’s a great advantage as well, building in knowledge sharing and continuous learning.

To prevent the reactive process that I worked under from happening to you, in this issue of TD at Work I guide you in becoming a proactive champion builder. You will learn:

• what shadowing and rotational programs are
• strategic reasons for building rotational programs and shadowing opportunities
• simple tools to get you started
• about a few companies that have developmental and rotational programs in place
• how to achieve programs that involve learning “stickiness” and winning outcomes.

Let’s take a look at both types of development programs.

**Job Shadowing**

As the name implies, shadowing is the experience of having an employee accompany and observe a worker in her respective department as she performs her job, with this individual explaining her job and department. A participant in a job shadowing program, for example, may attend product development team meetings, watch how an idea is transformed into a product and how the team prototypes a product, listen to feedback from individuals who are testing the early version of the product, and then see how the team revises the product in response to users’ comments and questions.

Shadowing provides a taste—or appetizer—of what it may be like to work in an alternate area of the company. This type of opportunity can also be helpful for college students (via an external shadowing program) who may want to explore whether a position or industry is a long-term career interest. For employers, an external shadowing program can be a way to showcase the company culture to aspiring talent.

Shadowing programs can be structured or unstructured. As Jeffrey Dalto writes in his Convergence Training blog post, the problem with an unstructured program may be that, as the name indicates, it has no real structure: “It may not be clear exactly what the less experienced worker is supposed to learn. So, whether or not the new worker learns the truly critical information is left up to chance—sometimes they do, sometimes they don’t.” On the other hand, structured programs generally have clearly defined roles, objectives, and expectations.

**Rotational Programs**

In contrast, in rotational programs, employees rotate between jobs, teams, and departments, fully performing the job functions and roles for a set time period (generally anywhere from three months to one year). They move between different departments of the company, cross-training and developing.

Using the food analogy, if shadowing programs are an appetizer, then rotational programs provide the full meal, with different “courses” in a buffet and ask participants to pull up a chair to the table and partake—to actively be a part of the team, not a guest.

Participants become intricate members of the new team. For example, if a sales team member is conducting a rotational tour with the marketing department, he may
be asked to take on the team lead role for a new product launch. He would meet with the product development team to learn about the targeted audience, how the product is designed to meet the audience's needs, and other relevant aspects of the process. Through mentorship and coaching with marketing colleagues, he would learn about marketing methods at their disposal, how the target audience generally receives their information, and so forth. Depending on his expertise, he may sit down with the marketing team member and project managers to develop a timeline for the marketing campaign.

While this sales team employee is completing his rotational assignment, another individual may be assigned to help out the sales team, or the sales team may divide his work among themselves while also setting aside some nonurgent work for the short term. The sales department may have team members take turns completing rotational assignment so that colleagues aren’t shouldered with the burden of additional work all the time.

Rotational programs, unlike shadowing, need to be structured and designed well to ensure success, and they need to provide an in-depth, on-the-job learning experience. As Susan M. Heathfield says in “Keys to Successful Job Rotation,” an effective rotational program requires careful planning and an end goal.

**BENEFITS AND CHALLENGES**

An array of research point to the benefits of shadowing and rotational programs. According to Robert Half, some of the benefits are fresh perspectives on existing roles, an acceleration of employees’ professional development, and a reduction in turnover.

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**Discovering the Value of Shadowing and Rotational Programs**

I felt like a pioneer when I created a shadowing program in the late 1980s. At that time, I was working in the luxury hotel industry. Even then, one of the most important improvement areas in talent management was decreasing high levels of turnover. I was fortunate to work for highly rated boutique luxury properties, and from the outside perspective, it was hard to believe that places with a spotless reputation, glamorous surroundings, and celebrity VIP clientele would be concerned with staff departures.

The reality was that those same VIP clients also brought with them a lot of out-of-the-ordinary work stressors and pressures that directly led to high staff turnover. This occurred at all levels of the hotel industry, and I remember sometimes losing pivotal talent right after particularly stressful VIP stays. One afternoon, I was conducting interviews to replace a key event manager. The person who had been in the role previously quit without much notice, and we needed to hire a great replacement—fast.

I was interviewing the top candidate, thinking the interview had been going well. When I asked him if he had any questions for me, he said, “The last hotel I worked at had shadowing opportunities in several departments. In fact, that’s how I came to work in the banquet events area. You have those, don’t you?”

Here is the part in the story where I pause to admit to you that no, we did not. But instead of answering his question with an all-out negative, I said: “I think shadowing programs in hotels are great. Tell me more about what that program was like.”

That was my first foray into understanding the value of shadowing and rotational programs. We hired that individual and then asked him to be part of a pilot project committee dedicated to building a shadowing program. One month later, we had one built and implemented that was well received and that the hotel retained for many years. That same shadowing program became the seed for a full-grown rotational program for the hotel that corporate then mirrored for all its properties.

Here is the good and bad news: You can build an initial shadowing program well and complete it inexpensively and quickly, but your incoming talent (Millennials especially) may already expect that you have one fully in place.
development, a strengthening of succession planning, and an enhancement of recruitment and retention.

And according to research from the National Association of Colleges and Employers (NACE), retention rates were significantly higher for employers with rotational programs than those without. At the one-year mark, employers with rotational programs had a 91 percent retention rate, compared with 71 percent for companies without. Meanwhile, at the five-year mark, the comparison was 71 percent versus 60 percent, respectively.

However, developing and running these programs are not without their challenges and will require significant work on your behalf as a talent development professional, including selling the program to leadership and getting managers and employees on board.

Benefits
Although often overlooked, shadowing and rotational programs can be highly effective as talent and development tools. For instance, a rotational program can provide employees with in-depth, microlearning experiences for gaining context and a systems perspective that could have taken them decades to achieve via traditional career tracking paths. Of course, rotational programs are not applicable nor realistic for jobs and roles that need highly trained, credentialed skills. However, simply having employees experience varied departments and teams via shadowing programs creates opportunities for them and the organization to gain a large view of where each individual fits best.

Let’s explore further some of the other benefits of shadowing and rotational programs.

Addresses talent gaps and emergencies
The opportunity to experience another department or function is a shadowing program benefit for working adults and students. For the organization, such a program may allow a level of cross-training to have a buffer should someone leave the organization or be temporarily unavailable. It also can improve culture and cut across siloes in that employees experience other departmental roles. Programs that involve shadowing by students can help fill the skills gap longer term because these programs can introduce careers to young people, careers they weren't familiar with prior to the shadowing.

The end goal for an organization may be to have a talent pipeline or to have a person who can cover in a role should the employee in that position leave the organization or be unavailable due to vacation, injury, or family crisis. The rotational program goal for the employee may be to prevent him from getting bored or burned out in his current role.

I also have seen rotational programs address extreme talent emergencies. For example, one company I worked with had a solid focus on succession planning and, once individuals were within a few years of retirement, required leaders and their direct reports to choose a person as their successor for potential grooming into their role. What they could not possibly foresee was tragedy—the company suffered two tragic and untimely leader deaths in proximity of each other. Successors stepped into place, and then each of those managers chose top talent directly from previous company rotational programs to replace them, citing that their view of the company was holistic and that each had the most trusted relationships across the company during a difficult time.

Boosts engagement and job satisfaction
It would be unrealistic to say that creating and implementing shadowing opportunities or a rotational program will be the magic pill that will take care of all your engagement and job satisfaction woes. However, according to SHRM research on why employees tend to leave or stay, 9 percent of the time the reasons tie to a lack of opportunities for training and development and lack of career advancement opportunities. This same research noted that one of the greatest contributors to employee job satisfaction is opportunities for individuals to use their skills and abilities.

The Gallup report How Millennials Want to Work and Live further found that 87 percent of Millennials say development opportunities are important to them in their job. And given that Millennials, on average, only remain at a job for two years (this increases to five years for Gen Xers and seven for Baby Boomers), companies looking to strengthen their retention strategies beyond training and development may want to pursue a rotational program.

It’s important that you secure coaching and development support for your job shadowing or rotational program.