EVALUATING THE IMPACT OF LEADERSHIP TRAINING ON EMPLOYEE RETENTION AND PROMOTION: AN AUTOMATED APPROACH USING WORKDAY, BOX, AND SMARTSHEET

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Abstract

Employees are the most valuable assets in any organization, making their training and development pivotal for sustained business growth, success, and workforce retention. Companies invest significantly in designing and implementing leadership training programs for senior management to drive positive organizational impact and enhance retention and growth within their management chains. While the importance of training is undeniable, it is equally critical for Human Resources (HR) teams to measure the impact of leadership training on the retention rates and promotion of participants and their subordinates. This article investigates advanced reporting, document management, and project management tools to create an automated process for assessing the impact of leadership training on retention and promotion rates. Additionally, it evaluates the specific tools and customizable solutions offered by Workday, Box, and Smartsheet to support this process.

Keywords: Workday, Box, Smartsheet, Retention Rate, Advanced Report, Document Management, Human Resources, Management Chain, Project Management Tool, Human Capital Management, Learning & Development, Return on Investment (ROI)..

I. INTRODUCTION

The maxim "people don't leave companies, they leave managers" [2] highlights the significant influence managerial quality has on employee retention and organizational success. Ineffective managers contribute substantially to organizational turnover and impede team agility, innovation, and productivity [2]. According to Gallup, 70% of team engagement is contingent upon the manager [2], yet only 20% of employees worldwide report feeling engaged at work, often due to feelings of underutilization and poor management [1]. Consequently, Gallup has also found that teams with exceptional managers achieve 27% higher revenue per employee [2].

Effective leadership is fundamental in uniting team members towards a common objective [2]. In the absence of strong leadership, efforts become disjointed and directionless, leading to inefficiency [2]. Given that an organization's success is closely tied to its people, it is essential for managers to cultivate skills in people management, conflict resolution, and negotiation to enhance their leadership capabilities [3]. Therefore, training programs for senior managers are crucial for fostering a values-based organizational culture [3]. These programs are particularly

important for managers, department heads, and agency leaders who are responsible for overseeing employees and ensuring their success and satisfaction within the company [1,5]. Well-designed training programs enhance managerial effectiveness, leading to higher employee satisfaction, loyalty, productivity, and retention rates [3,4,5].
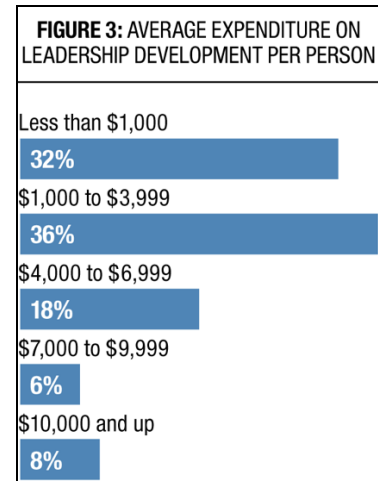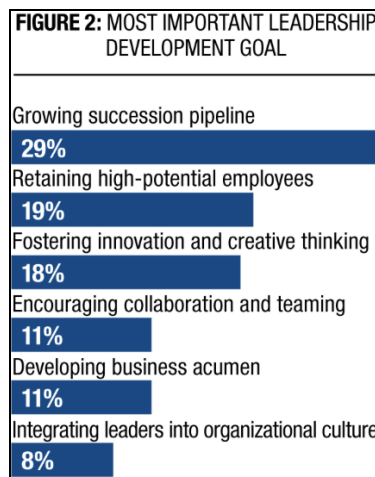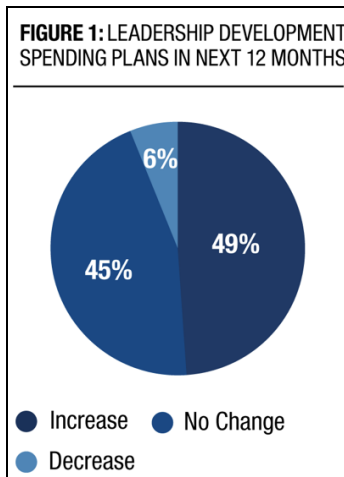
Currently, organizations invest approximately $1,000 per employee annually in training, with large companies averaging nearly $20 million in total training expenditures in 2018 [4]. Despite significant investments in training, learning and development (L&D) leaders continue to face challenges in analyzing and quantifying the outcomes of their efforts [4]. Measuring the effectiveness of training for senior management personnel is essential for companies of all sizes, as it directly influences workforce retention and growth [6]. Effective training leads to improved employee performance and satisfaction, boosts team morale, and enhances return on investment (ROI) [6].

II.   PROBLEM STATEMENT

The behaviors exhibited by managers significantly influence the mental health and engagement of their subordinate workers [7]. A systematic review spanning three decades of research indicates that positive managerial behaviors, such as consideration and support, are correlated with enhanced well-being and reduced distress among subordinates [7]. Additionally, managerial communication behaviors have been found to positively affect work engagement, particularly among nurses [7]. Thus, training managers holds potential for improving subordinate work engagement [7].

Organizations allocate substantial portions of their learning budgets to leadership training, given its critical impact on organizational culture and workforce dynamics [8,9]. Key priorities for organizations investing in leadership training include: 1) developing a robust succession pipeline, 2) retaining high-potential employees, and 3) fostering innovation and creative thinking [8].

Recent survey data from over 28,000 business leaders in 2017 underscore the significant financial commitment to leadership training aimed at achieving the dual objectives of growing the succession pipeline and improving retention rates [9]. Figures 1 [9], 2 [9], and 3 [9] below illustrate the significant investments made by organizations in leadership training, with the primary objectives of growing the succession pipeline and enhancing retention rates [8,9].

FIGURE 1: LEADERSHIP DEVELOPMENT SPENDING PLANS IN NEXT 12 MONTHS

6%
49%
45%
● Increase   ● No Change
● Decrease

FIGURE 2: MOST IMPORTANT LEADERSHIP DEVELOPMENT GOAL

Growing succession pipeline
29%
Retaining high-potential employees
19%
Fostering innovation and creative thinking
18%
Encouraging collaboration and teaming
11%
Developing business acumen
11%
Integrating leaders into organizational culture
8%

FIGURE 3: AVERAGE EXPENDITURE ON LEADERSHIP DEVELOPMENT PER PERSON

Less than $1,000
32%
$1,000 to $3,999
36%
$4,000 to $6,999
18%
$7,000 to $9,999
6%
$10,000 and up
8%

The figures clearly demonstrate that organizations are spending considerable amounts on leadership training with the intent to achieve these critical goals [9]. However, measuring the effectiveness of such training remains a manual and labor-intensive process [10] for Human Resources (HR) and Learning & Development (L&D) teams, requiring data extraction from Human Capital Management (HCM) systems and learning platforms.

Even when organizations utilize advanced HCM systems like Workday, which offer comprehensive learning modules, there are often no built-in tools or reports to automatically calculate the retention or promotion rates of leadership training participants or their subordinates. This lack of integrated features within HCM or learning systems presents a significant challenge. HR and L&D teams must extract relevant data from disparate systems and perform complex analytics to generate the necessary metrics for senior management. These metrics are essential for demonstrating the impact of leadership training on retention and promotion rates, thereby justifying the investment in such programs [10].

III.   SOLUTION
3.1 Advanced Reports in Workday
Workday offers advanced reporting capabilities that allow organizations to perform a variety of actions on data derived from primary and related business objects [15]. These actions include computing average, minimum, or maximum values of currency and numeric fields, counting occurrences, grouping data into up to nine hierarchical levels, filtering and sorting data, including group headers and names in reports, outlining data, subtotaling and totaling based on group hierarchy, summarizing detailed data rows, and using one or more advanced reports as sub-reports in composite reporting [15]. Fields from related business objects can be directly included in reports if they have a direct relationship with the primary business object [15].

The technology team can leverage these advanced reporting functionalities to create two specific reports: 'Leadership Training Participants' and 'Direct Reports of Leadership Training Participants.' The data source for these reports will be 'All Active and Terminated Workers'

with 'Worker' as the primary business object. The 'Leadership Training Participants' report will extract details of senior employees who have attended leadership training, including hire and termination dates, active status, last promotion date, training attended, and completion date. Similarly, the 'Direct Reports of Leadership Training Participants' report will extract details of employees reporting to senior managers who have attended leadership training.

The output of the advanced reports discussed above can be extracted from Workday and stored in Box to be fed into Smartsheet to run analytics on it and generate statistics for retention and promotion rate.

The figures below illustrate the report definitions for both reports, detailing the data source, primary business object referenced, and the fields included.

Report Name	Leadership Training Participants
Report Type	Advanced
Data Source	All Active and Terminated Workers
Data Source Type	Standard
Primary Business Object	Worker

Columns

Business Object	Field	Column Heading Override	Format	Options
Worker	Worker			
Worker	Business Title			
Worker	Manager - Effective Dated			
Worker	Email - Primary Work			
Worker	CF EE Division ▮▮▮			
Worker	Hire Date			
Worker	Termination Date			
Worker	Active Status			Show No When False
Worker	CF ESI WOrker Latest Promotion	Most recent Promotion		
Worker	Last Promotion Date			
CF ESI Leadership Training Enrollment	Learning Content Title			
CF ESI Leadership Training Enrollment	Learner's Registration Date			
CF ESI Leadership Training Enrollment	Registration Status			
CF ESI Leadership Training Enrollment	Record Completion Status			
CF ESI Leadership Training Enrollment	Course Attendance Status			
CF ESI Leadership Training Enrollment	Completion Date			

Figure 4: Definition of the advanced report - 'Leadership Training Participants'

Report Name	Direct reports of Leadership Training participants
Report Type	Advanced
Data Source	All Active and Terminated Workers
Data Source Type	Standard
Primary Business Object	Worker

Columns

Business Object	Field	Column Heading Override	Format	Options
Worker	Manager - Effective Dated	Manager - True North Participant		
Manager - Effective Dated	CF ESI Leadership Training Enrollment			
Manager - Effective Dated	CF LRV Registration date for TN	Registration Date		
Manager - Effective Dated	CF LRV Enrollment Status for TN	Registration Status		
Worker	Worker			
Worker	Business Title			
Worker	Email - Primary Work			
Worker	CF EE Division ▮▮▮			
Worker	Hire Date			
Worker	Termination Date			
Worker	Active Status			Show No When False
Worker	CF ESI WOrker Latest Promotion	Most recent Promotion		
Worker	Last Promotion Date			

Figure 5: Definition of the advanced report - 'Direct Reports of Leadership Training participants'

3.2 Document Management System – Box

Document management entails the systematic process of creating, organizing, storing, retrieving, and managing documents to ensure efficient information flow within an organization [11]. Box, a cloud-based document management software, enables organizations to capture, manage, track, store, and dispose of documents [11]. It also offers robust security features to protect content from unauthorized access [11]. Given that the reports generated from Workday contain sensitive employee data—such as hire and termination dates, training completion dates, and last promotion dates—document security is a critical consideration [11].

The output of the Workday reports "Leadership Training Participants" and "Direct Reports of Leadership Training Participants" can be securely stored in a designated Box folder and subsequently utilized to feed data into Smartsheet for statistical analysis. Data can be transferred from Workday to Box either manually or via a custom integration that utilizes the reports exposed as a web service in Workday.
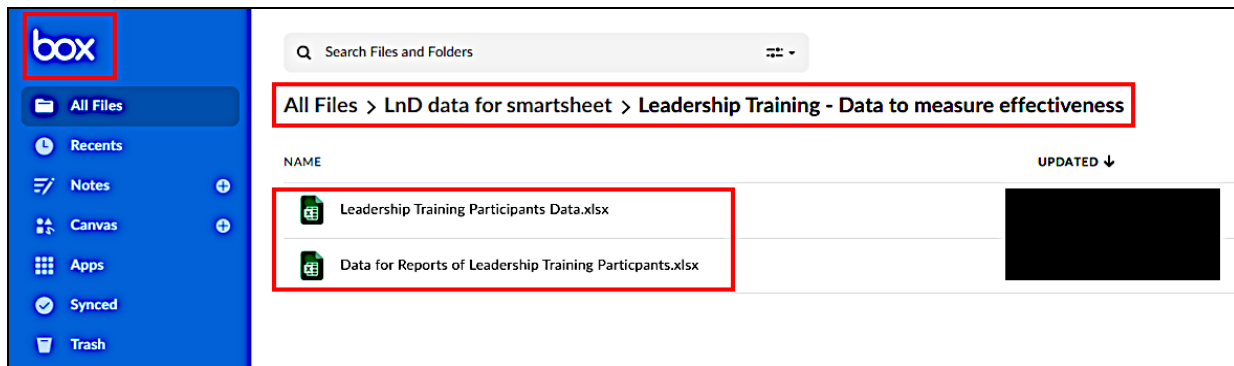

Figure 6: Folder 'Leadership Training – Data to measure effectiveness' in box

3.3 Smartsheet – Project Management Tool

Smartsheet is a versatile work management platform that enhances planning, accelerates project delivery, and boosts team productivity [12]. Smartsheet provides essential tools for effective project management to empower your teams to execute together with speed and accountability and reach successful outcomes faster [16]. Its user-friendly interface facilitates navigation and feature utilization for streamlined productivity [12]. Organizations can create custom reports that aggregate data from various sources, offering an overview of team activities. Dashboards can be configured to provide high-level data overviews, incorporating widgets such as charts, metrics, and reports [13].

Smartsheet's Data Shuttle allows seamless data transfer between Smartsheet and other systems like ERPs, CRMs, and databases, centralizing data for real-time decision-making [14]. Data Shuttle workflows include "upload data" and "offload data," enabling automatic data transfer and transformation [14]. These workflows define data sources and destinations, apply filters, map data, and schedule automatic runs [14].

Figure 7: List of 'Upload workflows' Data Shuttle

Figure 8: Configuration of the 'Upload Workflow' showing source location and the data file from 'Box'

Using Data Shuttle, the output from the Workday reports "Leadership Training Participants" and "Direct Reports of Leadership Training Participants" can be imported into Smartsheet from Box. Workflows can be run manually or scheduled to automate the extraction and upload processes [14]. Once the raw data is available in Smartsheet, pivot tables can be created to calculate retention and promotion rates.

Figure 9: Pivot table with control total to calculate the retention rate

Smartsheet dashboards serve as communication tools providing real-time visibility into critical data, centralizing essential information for teams [13]. Dashboards, composed of configurable widgets displaying live data from sheets and reports, can be shared with various stakeholders [13]. Chart widgets, powered by live data, transform data into visual trends and metrics, facilitating faster, informed decision-making [13].
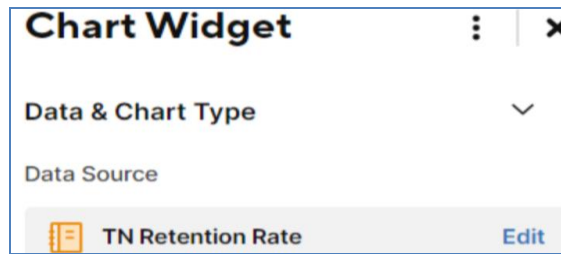

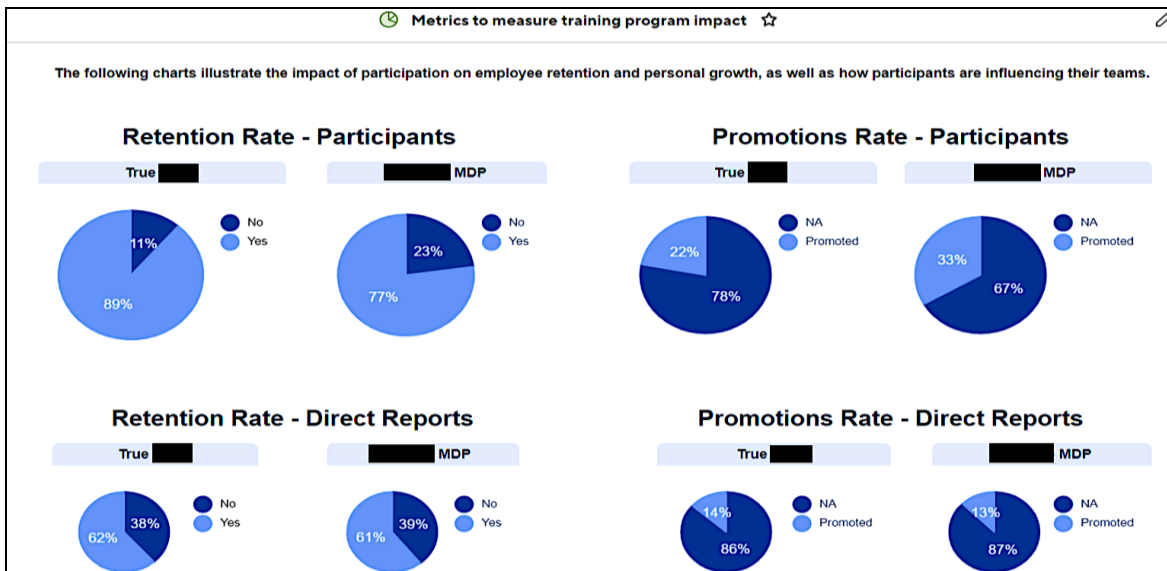Figure 10: Chart Widget setting showing 'Data Source'

Figure 11: Dashboard with different 'Chart Widgets' displaying the charts based on different data sources

The figures 10 and 11 illustrate the "Chart Widget" settings with defined data sources and a dashboard with multiple chart widgets displaying the retention and promotion rates of leadership training participants and their subordinates within the organization.

IV. LIMITATION AND FUTURE SCOPE

While the custom solution proposed in this paper aims to utilize advanced reporting in Workday, alongside the Document Management System (DMS) Box, to generate insights into leadership training's impact on employee retention and promotion, there are notable limitations that require attention. The following points outline the key constraints of this solution and suggest areas for future exploration:

1. **System Integration Complexity:** The solution involves the use of multiple systems—Workday, Box, and Smartsheet—introducing complexity in the seamless integration of these platforms. The current process requires data to flow from Workday to Box and subsequently to Smartsheet, which adds layers of complexity. A potential area for future work is to streamline this process by eliminating the intermediary step involving Box, enabling direct data transfer from Workday to Smartsheet.

2. **Integration with Artificial Intelligence (AI):** Another promising avenue for future research is the integration of this solution with the organization's AI capabilities. Leveraging AI tools could allow HR teams and senior management to extract key metrics and insights directly from the raw data in Workday using natural language queries. This enhancement would further automate and refine the reporting process, making it more efficient and user-friendly.

V. IMPACT

Many businesses invest substantial resources in staff training but often fail to gather data to analyze its business value. Typically, training effectiveness is measured through attendee feedback or course completion rates, overlooking whether employees have learned skills that improve workplace performance. To accurately measure training impact, organizations should focus on key metrics such as the succession pipeline and retention rate.

Assessing training impact ensures programs are necessary, effective, and efficient, aligning costs with the benefits received by employees and the business. A custom solution utilizing advanced reporting in Workday, document management through Box, and Smartsheet's Data Shuttle, Chart Widgets, and Dashboards can clearly evaluate a leadership training program's impact.

This approach automates data extraction on training attendance, hiring, termination, and promotions from the HCM system, reducing the HR team's manual workload. Storing report outputs in Box, a secure cloud-based application, protects employee data even outside the HCM system. Senior leadership can view dashboards in Smartsheet with metrics and statistics on training effectiveness without needing raw data.

This integrated approach enhances HR and L&D teams' visibility into training effectiveness and provides a tool for presenting data to justify leadership training programs to senior management.

VI. CONCLUSION

1. **Investment and Importance:**
   - Businesses invest heavily in leadership training, making it crucial to measure the actual impact on organizational success and workforce retention.
2. **Effective Measurement Metrics:**
   - Accurate assessment of training impact requires focusing on key metrics such as the succession pipeline and retention rate, rather than just feedback and completion rates.
3. **Automated Data Processes:**
   - Advanced reporting in Workday automates data extraction, reducing manual workload and ensuring accurate, secure data collection.
4. **Comprehensive Analysis Tools:**
   - Utilizing Box for secure data storage and Smartsheet for data analysis and visualization allows real-time assessment of training effectiveness through detailed dashboards and metrics.
5. **Enhanced Visibility and Justification:**
   - This integrated approach provides HR and L&D teams with the tools to demonstrate the impact of leadership training to senior management, supporting informed decision-making and continuous improvement.

Ultimately, this ensures that training programs are aligned with organizational goals and deliver measurable business value, reinforcing the strategic importance of investing in leadership development.

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