In 2013, Loomis Sayles, a Boston-based asset management company, faced some critical talent management challenges. Upon analyzing the results of a comprehensive culture assessment and survey, senior management recognized that in order to recruit, retain and advance women in leadership, they would need to invest differentially in their women leaders. What followed was a three-year learning journey of discovery, innovation and collaboration that planted the seeds for four new programs designed to recruit, retain and advance female talent at the firm.

After evaluating several potential leadership development partners, Loomis decided to partner with Linkage to create a 17-month Advancing Women in Leadership Program. The immersive learning experience included 360° assessment, one-on-one coaching, practical skill building in both large- and small-group settings, and peer learning and exchange.

In October 2014, the program kicked off with Linkage’s Women in Leadership Assessment™, a 360° tool that evaluates the 11 competencies proven to accelerate leadership growth. Following the assessment, participants attended Linkage’s Women in Leadership Institute™, a four-day immersion program that brings 600 women together from major global organizations. The experience offers inspirational keynotes, targeted competency sessions and small-group learning to help leaders achieve transformational growth.

In the months that followed, participants received feedback on their assessment results and one-on-one coaching sessions. This helped address individual growth areas and develop strategic action plans accordingly. Simultaneously, participants attended three skill-building workshops focused on competencies critical to helping them realize their full leadership potential. They used hands-on exercises and practical tools designed to master critical areas, including how to achieve maximum impact as a leader, drive successful change, and effectively manage conflict.

Participants continued to meet monthly for facilitated sessions to address the challenges facing women as they ascend into more senior-level roles.

“When we started this work, we didn't have a women's story to tell.... Now, we have that story.”

—Elaine Stokes, VP, Portfolio Manager
REAL CHANGE, REAL IMPACT

Participants launched formal efforts targeted at recruiting, developing and advancing women at Loomis while the initiative was in process and following its conclusion in January 2016. One such example is the Undergraduate Women’s Investment Network (UWIN), which is focused on female undergraduates at Bentley University. This effort has already engaged over 40 students in mentoring and internship opportunities.

Also, over 50% of the 281 women in the organization have joined a new women’s network, which is focused on communication, knowledge sharing and community building. Initial meetings centered around establishing the group charter and creating a more connected culture capable of uncovering new opportunities that will help talent at the firm learn and grow.

A new mentoring program has also exceeded expectations. “We were hoping to facilitate 15-20 relationships in the first year,” says program founder, Debbie Lewis, VP, Human Resources Manager.

“We have already surpassed that goal with 35 formal mentor/mentee relationships,” she continued.

Participants, who include both remote and global employees, are excited to learn from one another and are focused on accelerating and growing their career paths. Debbie is also spearheading a professional development group, which is focused on assessing and meeting the training and development needs of all employees.

The aforementioned programs are showing great promise, having reached the majority of the almost 700 employees. Participants have ignited great interest in these organized efforts and are eager to create a connected, collaborative and supportive culture where every employee is capable of realizing her fullest potential. They are facilitating the change that they want to see—cultural mindsets are shifting, new connections are forming, and a remarkable movement is well underway that will create a better future for generations to come.

A MULTIFACETED DEVELOPMENT JOURNEY

![Monthly Development Stages](image)

At Linkage, we are passionate about developing leaders who can create lasting impact. Call +1.781.402.5555, email info@linkageinc.com, or visit us online to learn more.