

CREIO Meeting - ESADE Business School, Barcelona, Spain – September 7th – 8th, 2023

Conference Location: ESADE Business School - Building 3, Av. d'Esplugues 96, 08034 Barcelona, Spain

Agenda for September 7th

CREIO Mission: *To advance research and practice of emotional and social intelligence in organizations through the generation and exchange of knowledge.*

- 8:30 **Coffee and Welcome**
- 9:00 **Presentation by Rob Emmerling**
- Introduction and Welcome
 - Meeting Norms
 - CREIO – Current Initiatives and Future Directions
- 9:20 **Presentation by Hillary Anger Elfenbein**
- Workplace Relationships and Negotiations are Infused with Affect
- 10:20 **Presentation by Ronald Humphrey**
- Evidence for the Value of Emotional Intelligence in the Workplace: Meta-Analytic Findings
- 11:20 **Break**
- 11:40 **Breakout Groups to Process Morning Presentations**
- 12:20 **Presentation by Ashis Sen**
- Increasing Self-Awareness Through Coaching: Case Study of Indian Executives
- 1:00 **Lunch - Onsite**
- 2:30 **Presentation by Joan Manuel Batista-Foguet**
- How the Use of Technology Impacts Emotional Intelligence
- 3:15 **Presentation by Richard Boyatzis (Virtual Presentation)**
- Developing Emotional and Social Competencies
- 4:30 **“Coffee Talk” – Small Group Debrief Over Coffee**
- 5:00 **Conclude**

Agenda for September 8th

- 8:30 **Coffee and Welcome**
- 9:00 **Introduction**
- 9:15 **Presentation by Marcello Mortillaro and Juliane Voelker**
- Being Emotionally Intelligent in an Emotional Working World
- 10:20 **Presentation by Steve Wolff and Richard Belezut**
- Emotional Intelligence: Applied Case Study
- 11:00 **Break**

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| 11:20 | Presentation by Doug Lennick |
| | <ul style="list-style-type: none"> Emotional Intelligence in the Financial Services Industry |
| 12:00 | Presentation by Bénédicte Gendron |
| | <ul style="list-style-type: none"> Why Emotional Capital and Bienveillance Matter for Inclusive Excellence in Organizations? |
| 1:00 | Lunch - Onsite |
| 2:30 | Presentation by Chuck Wolfe |
| | <ul style="list-style-type: none"> EI and the 7 S Model of Management together enhance organizational performance |
| 3:45 | "Coffee Talk" - Small Group Debrief Over Coffee |
| 4:15 | Emotional Intelligence Competencies in Professional Education - Panel Discussion |
| 5:00 | Conclude |

Presenter Bios and Presentation Overviews

Presentations – Thursday, September 7th, 2023

Hillary Anger Elfenbein is the John and Ellen Wallace Distinguished Professor and Chair of Organizational Behavior at the Olin School of Washington University in St. Louis. She holds a Ph.D. in Organizational Behavior, a Master's degree in Statistics, and undergraduate degrees in Physics and Sanskrit, all from Harvard University. Dr. Elfenbein served for five years on faculty at the University of California, and two years as a Senior Researcher at the Harvard Business School. Her research focuses on emotion in the workplace, including emotional intelligence, interpersonal relationships, negotiation, and personality. She served as an Associate Editor at Management Science. In addition to teaching and doing research, she can be found performing stand-up comedy and was voted one of St. Louis' 30 funniest people.

Session Title: Workplace Relationships and Negotiations are Infused with Affect

Session Overview: Psychological research on emotion has made its way into organizational behavior writ large. In this talk, Hillary will discuss research about emotional intelligence and workplace relationships as well as the implications of emotional experience for negotiations. In both cases, it appears almost impossible to understand the longstanding domains of leadership, collegueship, and resource allocation without incorporating the emotional element.

Ronald Humphrey is a Distinguished Professor in Leadership at the Management School at Lancaster University. His research interests include leadership, entrepreneurship, customer service, emotions in the workplace, empathy, emotional labor, emotional intelligence, person perception, identity theory, labeling theory, attribution theory, collective efficacy, careers, project management, assessment centers, job characteristics, and other topics. He is on the editorial board of The Leadership Quarterly, where he edited a special issue on emotions and leadership. Professor Humphrey was one of the founding members of the Network of Leadership Scholars (also known as LDRNET) and was co-program chair for the Professional Development Workshops organized by the Network at Academy of Management Conferences. He has published in a range of journals, including the *Academy of Management Review*, *Academy of Management Perspectives*, *American Sociological Review*, *Research in Organizational Behavior*, *Leadership Quarterly*, *Social Psychology Quarterly*, *Journal of Organizational Behavior*, *Human Relations*, and *Organization Science*.

Session Title: The Overwhelming Evidence for the Value of Emotional Intelligence in the Workplace: Meta-Analytic Findings

Session Overview: In this presentation, Ron will cover two meta-analytic reviews that emotional intelligence and service quality and on emotional intelligence in the hospitality industry. The second part of the presentation will summarize for attendees a series of meta-analytic reviews that demonstrate the positive effects of emotional intelligence across a wide range of leadership and workplace outcomes. The presentation will focus on the big picture and will not overwhelm audience members with all of the statistical details (which are available for those who are interested).

Richard Boyatzis is a Distinguished University Professor at CWRU, as well as a professor in the Departments of organizational behavior, psychology, and cognitive science. Richard has won many awards at Case Western Reserve for research, teaching, and service. He is a Fellow of the American Psychological Association, Society for Industrial and Organizational Psychology and the Association for Psychological Sciences.

He is the author of more than 200 articles and nine books that include: *The Competent Manager: A Model for Effective Performance*; *Innovations in Professional Education: Steps on a Journey from Teaching to Learning*, with David Kolb and Scott Cowen; *Transforming Qualitative Information: Thematic Analysis and Code Development*: the international best-seller, *Primal Leadership: Realizing the Power of Emotional Intelligence* with Daniel Goleman and Annie McKee; *Resonant Leadership: Renewing Yourself and Connecting with Others Through Mindfulness, Hope, and Compassion* with Annie McKee; *Becoming a Resonant Leader: Develop Your Emotional Intelligence, Renew Your Relationships, Sustain Your Effectiveness*, with Annie McKee and Fran Johnson; and *Helping People Change: Coaching with Compassion for Lifelong Learning and Growth* with Melvin Smith and Ellen Van Oosten.

Session Title: Emotional and Social Intelligence Competencies of Coaches

Session Overview: Coaching as a practice and process has grown. Coach training and certification is currently based on competency models derived from opinion surveys not research on coaching outcomes. Competency models developed on expert opinion were about 50% accurate in terms of predicting managerial effectiveness in prior studies. A study of coach behavioral competencies, not self-assessment, was conducted with 240 coach-client dyads involving 60 different coaches predicting desired behavior change of the clients over two years. Coaches' competencies predicting client change were: achievement orientation, adaptability, emotional self-control, empathy, organizational assessment, and influence. A subsample of 135 dyads based on 27 different coaches was studied with coaches' General Mental Ability (GMA). Competencies that predicted client change were the above list and conflict management, with near significant findings for coaching/mentoring and teamwork. Coaches' GMA was not significant. More studies are needed but even the current results can guide training and certification programs.

Joan Manuel Batista-Foguet, is since 1995 Full Professor in the Department of Methods at ESADE Business School (University Ramón Llull), and the former Research Director of ESADE (2001-2008) and the former Chair of the Department of People Management and Organization (2014-2018) and the Director of the Development Leadership Research Centre at ESADE. He has degrees in Industrial Engineering (Polytechnic Univ. of Catalonia (1975) and in Psychology from the Univ. Barcelona (1982). He also has a Master degree in Social Sciences Data Analysis from the Univ. of Essex and earned a PhD in Engineering from the Polytechnic Univ. of Catalonia in 1982. He has also a diploma in Management from ESADE (1990) and on Leadership Development from CASE Western Reserve Univ. (2009). He is an accredited coach by the HAY group (US). Since 1975, he has been a lecturer and Associate Professor of Statistics at the School of Engineering (Polytechnic University), and at the Faculty of Psychology (University of Barcelona). His fields of interest include the improvement of Measurement in Social Sciences Research, with applications of multivariate statistical models and Structural Equation Models (Confirmatory Factor Analysis, Multitrait-Multimethod designs, Simplex Models, Covariance and Mean Structures, Multigroup Analysis, Multiplicative Effects) into Survey Research, applied to Attitudinal Research, Social and Emotional Competences of individuals and of groups, Management Control Systems, Branding, Service Quality, Quality of Life, Well-Being, Schoolchildren habits, subjects on which he has been and still is Principal Investigator of various research projects, and has published various books and articles in leading journals.

Session Title: How Smart Phone Use Impacts Self Awareness

Session Overview: Research has already demonstrated the adverse neurological effects stemming from the typical misuse of Smart Phones, including reductions in positive emotions, neurogenesis impairment, compromised immune function, techno-stress, cortisol release, creativity, and diminished learning capacities. Furthermore, when Smart Phones are used in maladaptive or problematic ways, it disrupts an individual's impulse control and behavior management. This is evidenced by excessive phone usage, drastically reduced attention spans and constant distractions. These factors are a challenge to relationship management, decrease empathic responding, and often lead to a sense of loneliness and social isolation. Hence, an evident Research Question emerges: Are we harnessing the immense utility of the Smart Phone, or conversely, has the addiction sought and induced by its content, coupled with its convenient portability and pervasive usage, surpassed the individual autonomy it initially afforded us? Are we experiencing greater freedom or increasing enslavement? Discussion of research currently underway in this area and future planned research be discussed in this presentation.

Ashis Sen is an Adjunct Professor at IIM Nagpur (Human Resource Management and Organizational Behavior) which is one of the premier management schools in India. He is also a visiting professor at Great Lakes University Gurugram. He is a member of the Advisory Panel on Leadership Development at IIM Nagpur. His consulting and Emotional Intelligence interventions span the largest organizations in India like Indian Railways, Reserve Bank of India, ONGC, Hindustan Petroleum, L&T, and Infosys BPM amongst many others. He headed Capability Building at Hindustan Petroleum a Fortune 500 company and L&T one of the largest Engineering Firms in the world. He has helped a large number of companies to build leadership strength.

Session Title: Increasing Self-Awareness Through Coaching: Case Study of Indian Executives

Session Overview: Results of an intervention on Emotional Intelligence competencies and Mindfulness for 28 executives at Balmer Lawrie a Public Sector Company in India will be presented. The intervention incorporated a coaching component spanning a year. The executives were middle and senior management employees. The results in terms of their competencies in relationship building, emotional self-awareness, emotion regulation, empathy and social awareness were mapped by way of self-assessment. The findings have been corroborated by their teammates with periodic presentations by the participants to the board members of Balmer Lawrie. The organization has found the intervention highly useful in building leadership. The participants have applied the concepts learned during coaching and emotional intelligence workshops and reported significant and positive usage in labeling emotions, emotion regulation strategies, mindfulness, cognitive and emotional empathy, and relationship building. A second intervention with more than 100 middle and senior executives at Indian Oil Corporation Limited a Fortune 500 company, also underwent mindfulness and emotional intelligence training and coaching conducted and they have reported significant improvements in empathy, emotional self-awareness, emotion regulation and relationship-building competencies.

Presentations – Friday, September 8th, 2023

Marcello Mortillaro obtained his PhD in Communication Psychology from the Catholic University of Milan in 2007. Dr. Mortillaro is the Head of Applied Research at the Swiss Center for Affective Sciences (University of Geneva, Switzerland), where he directed several projects in collaboration with public institutions and private companies. His most recent work focuses on emotional intelligence and he developed one of the first performance-based multi-branch instruments specifically designed to assess emotional intelligence in the workplace (Geneva Emotional Competence Test). The test has received wide public and industry attention and is already used and integrated in several companies, both for recruitment and staff training. He is currently leading a project in collaboration with the École Hôtelière de Lausanne for the assessment and training of emotional skills in the tourism and hospitality sector.

Juliane Völker is a psychologist and research scientist at the Swiss Center for Affective Sciences (“CISA”) of the University of Geneva, Switzerland. After having acquired her doctoral degree on emotional intelligence and musical emotions from the University of Trier, Germany, she joined the CISA to work on applying EI research to the hospitality industry. Her main focus is the development of EI measurement and training for hospitality.

Session Title: Being emotionally intelligent in an emotional working world

Session Overview: Today’s working world revolves around human interactions for which the ability to handle emotions is becoming widely recognized as critical. We present our approach to conceptualizing and measuring EI and why this could have important implications for both researchers and practitioners. In particular we will argue the need to evaluate EI considering specific contexts. Having investigated workers in office jobs and the hospitality industry, we will share our insights into the perspective of emotional intelligence (EI) as behaviors and not just as dispositions of the individual. By presenting some of our latest data, we discuss what it means to be emotionally intelligent in service-work contexts, and how we can put EI to use in assessment and training.

Steven Wolff is an expert on group emotional intelligence. Together with Vanessa Druskat, he has developed a theory of group emotional intelligence that extends the theory of individual emotional intelligence to the group level.

He has also conducted research in the areas of team effectiveness; managing performance in self-managed teams; team leadership; organizational leadership; C-Suite competencies; peer feedback; organisational learning; and partnerships between business and public schools. Steve also has extensive experience and expertise in survey design and psychometric analysis.

Richard Beletz is AIR Asset Management's Founder and Chief Executive Officer and is responsible for overseeing the firm's strategic direction and driving growth. He is the Chair of the Executive Committee and Investment Committee, and a member of the Portfolio Committee. Mr. Beletz has nearly 30 years of experience in various capacities in the investment industry. He has closed over \$1B in transactions for companies and investment products, possesses extensive deal experience in private equity and investment banking, and has an operations background as a former principal of three hedge funds. Mr. Beletz has a well-established track record in the life settlements space, which began in 2006 when he eventually launched his first life settlement hedge fund in conjunction with a life settlement brokerage business and a life expectancy company. He also has a background in life insurance and annuities that dates back to 1993, when he began his career as a financial advisor with Ameriprise. Mr. Beletz is considered a thought leader in the alternative investment space and actively participates in industry interviews and conferences. He earned a Bachelor of Arts in Economics from the University of Michigan and holds Series 7, 9, 10, 24, 63, and 79 securities registrations.

Session Title: Building an Emotionally Intelligent culture at AIR Asset Management in 3 hours a month

Session Description: We will explain how AIR Asset Management is cultivating an emotionally intelligent culture in just 3 hours a month independent of regular business activity. Rich will share the program's motivation, and Steve will elaborate on an approach that empowers individuals to take responsibility for shaping the culture. Our app prepares the team to engage in valuable discussions about the values in the Inspired Teams framework, leading to essential agreements on expected behavior. These agreements enable team members to make observations that strengthen the culture as they pursue their work. Finally, Rich will discuss the preliminary results.

Bénédicte Gendron is former Vice-President of the University of Montpellier III (21000 students) in charge of Vocational Education and Training in France, earned a Ph.D. in Economics of Education and Human Resources from the University Paris I -Pantheon-Sorbonne, and a Ph.D. in Psychology & Neuropsychology University of Montpellier III after a Post-doctoral research at UC. Berkeley at Policy Organization Measurement Evaluation-POME, Graduate School of Education and National Centre for Research on Vocational Education-NCRVE in the USA. She has developed the concept of "Bienvivance" in education and at work, derived from her research work and Economics concept of Emotional Capital awarded in 2006 of Louis Cros Prize from the prestigious French Academy and, in 2011 and 2012 by two other awards of the French National Association for the Promotion of School and University Health-AFPSSU.

Session Title: Why Emotional Capital and Bienvivance Matter for Inclusive Excellence in Organizations?

Session Description: Organisations face new challenges which implies creativity and flexibility of their collaborators. Therefore, the work atmosphere and environment must be organized in a way that people feel good at work and leader's emotional capital matters a lot to do so. Bienvivance is a new positive and operational concept of well-being issued from a combination of economics and neuropsychology outcomes that I developed in 2016 and I will present in this communication. I will show that emotional capital matters for implementing this atmosphere and above all for enabling inclusive excellence.

Chuck Wolfe is CEO of Charles J. Wolfe Associates, LLC, a leadership consulting company that uses emotional intelligence and organization development expertise to help achieve high performance. Chuck is a speaker, coach, and consultant. Clients include Kaiser Permanente, Exxon, Coca Cola, ESPN, Marriot, Allianz, US Coast Guard, Army, MIT, Wharton, Yale, small businesses e.g., Cannonball Express, Junction, and Nebraska Warehouse, local governments and schools. His publications include "Successful Leadership Coaches Influence Clients' Emotions, Thoughts, and Behaviors" in Professional Coaching Principles and Practice, "Emotional Intelligence: Emotion Roadmap," HR Director, and "The Practice of EI Coaching in Organizations: A Hands-on Guide to Successful Outcomes" in Educating People to be Emotionally Intelligent.

Chuck worked with Harvard Professor Tony Athos helping Tony create The McKinsey 7-S Model and with Yale President Peter Salovey and colleagues to co-author the MSCEIT certification program. Independently Chuck created the Emotion Roadmap an innovative process which facilitates emotionally intelligent outcomes. He has presented the Emotion Roadmap in two other EI certification programs including Dan Goleman's EI Coaching Program and Cliff Lansley's e-Factor inaugural session in 2023. He is a member of the Advisory Board for the International Society of EI and the EI Consortium. Since 2009 he has been hosting the volunteer Public Radio talk show program, "The Emotion Roadmap: Take the Wheel and Control How you feel."

Session Title: EI and the 7 S Model of Management together enhance organizational performance

Session Description: Chuck and his client use the Emotion Roadmap and the McKinsey Seven S Model to enhance trust, engagement and productivity in a trucking and warehousing company. The company is participating in creating intentional change that facilitates positive shared feelings in all the different constituencies they touch in order to generate competitive advantage. Also, for this presentation if there is a willing participant able to share an emotionally challenging situation, Chuck will use the Emotion Roadmap in a live demonstration.