Developing and Delivering a Learning Strategy
### Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contents</td>
<td>iii</td>
</tr>
<tr>
<td>Acknowledgements</td>
<td>v</td>
</tr>
<tr>
<td><strong>EXECUTIVE SUMMARY</strong></td>
<td>1</td>
</tr>
<tr>
<td>1 Focus of the research - aligning learning with business needs</td>
<td>1</td>
</tr>
<tr>
<td>2 The nature of learning strategy</td>
<td>1</td>
</tr>
<tr>
<td>3 Today’s vision for learning - key trends in thought and activity</td>
<td>1</td>
</tr>
<tr>
<td>4 Is today’s vision going to work? The barriers to implementation</td>
<td>2</td>
</tr>
<tr>
<td>5 Key questions for organisations</td>
<td>3</td>
</tr>
<tr>
<td><strong>1 INTRODUCTION</strong></td>
<td>4</td>
</tr>
<tr>
<td>1.1 Old ‘training’ wine in new ‘learning’ bottles?</td>
<td>4</td>
</tr>
<tr>
<td>1.2 Learning and strategy</td>
<td>4</td>
</tr>
<tr>
<td>1.3 Research questions</td>
<td>4</td>
</tr>
<tr>
<td>1.4 Research approach</td>
<td>5</td>
</tr>
<tr>
<td>1.5 Key themes from the literature</td>
<td>5</td>
</tr>
<tr>
<td>1.6 Structure of this report</td>
<td>11</td>
</tr>
<tr>
<td><strong>2 PERSPECTIVES FROM LEARNING THINKERS</strong></td>
<td>12</td>
</tr>
<tr>
<td>2.1 John Burgoyne: The nature of individual and organisational learning</td>
<td>12</td>
</tr>
<tr>
<td>2.2 Michael Eraut: Learning in the workplace</td>
<td>14</td>
</tr>
<tr>
<td>2.3 Chris Mabey: Some systemic reasons why learning fails</td>
<td>16</td>
</tr>
<tr>
<td>2.4 Andrew Mayo: Learning strategy - business-driven, not just business linked?</td>
<td>18</td>
</tr>
<tr>
<td>2.5 Graham Prentice: Recognising the nature of learning in achieving business change</td>
<td>19</td>
</tr>
<tr>
<td>2.6 Martyn Sloman: From training to learning - the new driver of excellence</td>
<td>21</td>
</tr>
<tr>
<td>2.7 Stuart Winby: Organisational learning</td>
<td>23</td>
</tr>
<tr>
<td><strong>3 PERSPECTIVES FROM LEARNING LEADERS IN ORGANISATIONS</strong></td>
<td>25</td>
</tr>
<tr>
<td>3.1 Associated British Foods</td>
<td>25</td>
</tr>
<tr>
<td>3.2 BBC</td>
<td>26</td>
</tr>
<tr>
<td>3.3 easyJet</td>
<td>28</td>
</tr>
<tr>
<td>3.4 Ernst &amp; Young UK</td>
<td>30</td>
</tr>
<tr>
<td>3.5 John Lewis Partnership</td>
<td>33</td>
</tr>
<tr>
<td>3.6 Ministry of Defence, dblearning</td>
<td>34</td>
</tr>
<tr>
<td>3.7 National Grid Transco UK</td>
<td>36</td>
</tr>
<tr>
<td>3.8 Prudential UK</td>
<td>38</td>
</tr>
<tr>
<td>3.9 Vodafone UK</td>
<td>40</td>
</tr>
<tr>
<td><strong>4 THE NATURE AND CONTENT OF LEARNING STRATEGIES</strong></td>
<td>43</td>
</tr>
<tr>
<td>4.1 Initial reflections on the ‘perspectives’</td>
<td>43</td>
</tr>
<tr>
<td>4.2 Shaping learning strategy as a process of dialogue</td>
<td>43</td>
</tr>
<tr>
<td>4.3 The dimensions of learning strategy</td>
<td>44</td>
</tr>
<tr>
<td>4.4 WHY does learning matter? The strategic purposes of learning</td>
<td>45</td>
</tr>
<tr>
<td>4.5 WHAT learning is prioritised? Achieving business alignment</td>
<td>47</td>
</tr>
</tbody>
</table>
4.6 HOW does learning take place? Methods for delivering learning activities and facilitating learning 50
4.7 WHERE does responsibility for learning sit? 55
4.8 WHO delivers learning? The organisation and resourcing of learning 55
4.9 SO WHAT? How do we measure the impact of learning? 58

5 SUMMARY OF KEY TRENDS AND QUESTIONS FOR ORGANISATIONS 60

5.1 The nature of learning strategy and the influences on it 60
5.2 Today’s vision for learning - trends in thought and activity 61
5.3 Is today’s vision going to work? The barriers to implementation 61
5.4 Key questions for organisations 62

APPENDIX - INVESTIGATING LEARNING STRATEGY IN ORGANISATIONS 67

REFERENCES AND FURTHER READING 69
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Executive Summary

1 Focus of the research - aligning learning with business needs

How should organisations develop and deliver a learning strategy? Does the adoption of the word ‘learning’ in organisations to amplify or replace the terms ‘training’ and ‘development’, signal a real change in thinking or is it just the latest fad?

This research project on behalf of the Corporate Research Forum has examined the current state of, and future challenges for, learning strategy in major UK organisations. Evidence was drawn from the literature, nine case studies, seven leading thinkers in this field, and eleven further organisations which responded to a survey of CRF members.

The research focused on:

- the nature and content of learning strategies in employing organisations, and their alignment with business and HR strategies
- how learning strategies are translated into practical learning activities
- how the effectiveness of learning is assessed
- how research evidence, theory and ideas are influencing learning strategies in organisations
- how the learning function is responding to the strategic demands on it.

2 The nature of learning strategy

Learning strategies are not just about what employees need to learn, but about why learning is seen as important and how learning will take place. So learning strategy has several dimensions, of which learning priorities at any point in time may not be the most fundamental or long-lasting.

The research led to a multi-dimensional model of learning strategy, as shown in the box above.

3 Today’s vision for learning - key trends in thought and activity

The project identifies a number of trends in the way organisations are approaching the issue of learning, including the following.

- A big shift in thinking from a focus on delivering training (input) to learning at work (process) and its impact on performance (output).
- A serious attempt by learning leaders to align learning priorities with business needs. This takes place both through personal discussions with executives, and through formal structures such as Training Committees at various levels.
- Organisations are developing varied metrics (both ‘hard’ and ‘soft’) for assessing the business impact of learning activities. Measuring ‘ROI’ is still espoused as the goal in some organisations, but is not a very realistic ambition for overall investment in learning as opposed to specific interventions.
- A shift in learning interventions for most staff towards shorter and more modular formal training, increasing provision of e-learning modules and other resources via computer access - with greater reliance on on-the-job coaching from the line manager.
- Technical training is still important and being given due attention. External regulation in many sectors is increasing the emphasis on specific, and assessed, technical or job-specific knowledge.
- A desire to offer more experiential learning through projects, secondments, career moves, etc, and more personal support - enriched feedback, coaching and mentoring, are examples. In practice this is quite resource intensive and usually only delivered to key groups such as managers and,
sometimes, professional staff.

- Much talk of ‘blended learning’ but only for key
groups do we find ‘programmes’ of learning activity
which combine varied learning methods in carefully
complementary combinations and sequences.

- A further big shift in thinking is from individual learning
to organisational learning. People are still
struggling to clarify what this really means. In practical
terms we see more emphasis on bespoke and team
interventions as a means of bringing learning closer
to the business and the job, and also becoming a
more collective experience.

- The term Organisation Development (OD) is being
used widely as a label for this type of
development work, often aimed at specific business
issues or major changes.

- Learning is seen as a vehicle for culture change
or supporting desired organisational values, often
expressed through competency frameworks.

- Organisational learning is also linked with the idea of
people sharing their knowledge in the workplace.
Networking is being encouraged, often through
‘communities of practice’ for certain occupations or
functions or groups addressing particular business
issues. Although a fairly new idea, it looks likely to
spread quickly, at least among knowledge workers.

- The training and development function is often
being re-named with the word ‘learning’
somewhere in its title. It is sometimes being
structured around the different kinds of activity
described above, and OD teams are emerging as a
means of putting some dedicated resource into team
and bespoke interventions.

- Outsourcing policy varies widely, but there is often
a move to using fewer external suppliers and working
more closely with them.

- ‘Business partner’ models are flavour of the
month in T&D as in HR, but the roles of business
partners in learning and development are still
evolving.

**Work Environment**

The workplace environment is not conducive to
‘natural’ learning. Failure is punished through
blame and often job loss, employees lack time
to reflect and talk to others, and there is
pressure to finish current tasks as quickly as
possible. Learning is still seen by some as
separate from working and meaning ‘time out’
from productive work.

**This barrier affects job design, resourcing and
social relations at work.**

**Management**

Managers are not ready to act as coaches or
role models. Managers have not been selected
in the past as learners or as interested in
supporting the learning of others. Managers’
jobs are expanding with supporting learning
being one of many new challenges for them.
The UK has under-invested in first line
management training. A learning culture
presents managers with more challenge from
below, which is not comfortable. Role models at
the very top are still often poor as regards
learning.

**This barrier concerns how managers are
selected and promoted, and the clarity and
consistency of what they are asked to prioritise.**

**Employees**

Employees are not self-managed learners and
neither are they being supported in becoming
so. The new learning orthodoxy is of self-
managed learners, but we know the UK has an
under-educated workforce with poor learning
skills. There is little time at work for learning and
managers are not ready to act as coaches.

- What would tempt an employee to spend hours on
e-learning?
- Who advises them on what learning activities to
undertake if their manager is not interested or skilled?
- What's really in it for them?

**This barrier concerns the place of learning in the
psychological contract for employees - and
honesty about the level of personal support**
Developing and Delivering a Learning Strategy

**most employees need in their development.**

**Resources**

Experiential and personalised learning is resource intensive. Exciting forms of learning activity are being introduced but only for a very small percentage of the workforce.

One of the most interesting challenges is how to make serious mentoring, coaching, action learning, project exposure etc available to the majority of the workforce in appropriate ways. A few organisations with high percentages of knowledge workers are making real headway - with many employees involved in learning sets) for example - but this is most unusual.

**This barrier requires good resource prioritisation and allocation - however appealing the intervention or activity.**

**Culture Change**

Culture change is not amenable to quick fixes. Another aspect of organisational learning is its emphasis on changing the culture of the organisation and indoctrinating employees with certain values - on lists which seem to change as often as the weather.

Writing lists of competencies which are value laden and then writing e-learning modules with those names is certainly not going to do the trick. Culture and values are lived not taught. Board members need to be helped to understand that their own behaviour is often the root cause of dysfunctional workplace culture.

The learning function can spot cultural issues and build a cultural dimension into all its work. However the levers to reinforce culture change - especially those of work design, selection and reward - lie well beyond the boundaries of the learning function itself. It can influence, but not command.

*It is not at all clear how we really expect this to happen through learning initiatives. This barrier, therefore, concerns a fundamental issue.*

**5 Key questions for organisations**

These trends and barriers lead us to conclude that the vision of learning aligned with business needs and taking place closer to the job is undoubtedly attractive. However it poses massive challenges for organisations. There is a real danger that formal training will reduce for many employees - especially the least skilled and worst managed - without any real increase in 'natural' on-the-job or experiential learning, coaching, and knowledge sharing.

Our consideration of these issues raises important questions.

1. Are we really directing our learning activity at improving business performance?
2. Are our employees able and willing to learn in the way that strategy assumes they will?
3. Is our use of varied methods for facilitating learning coherent and appropriate?
4. Are we putting learning close enough to the job?
5. Are our managers and leaders champions and role models for learning?
6. Is the learning function a flexible, professional and influential partner for the line?
7. Is the organisation learning to share and really use the know-how of its employees?

This study on developing and delivering a learning strategy suggests that these key questions should be asked - and answered - by learning leaders, executives and all stakeholders of learning in organisations.
1 Introduction

1.1 Old 'training' wine in new 'learning' bottles?

There are good reasons why the issue of learning is high on the corporate agenda. Organisations that learn and adapt are the ones best able to survive and prosper. There is also increasing evidence that development is a key factor in attracting and retaining high quality employees.

But how successfully do organisations develop approaches to learning which give their staff the skills and knowledge they need?

And, how far has the idea of 'organisational learning' been converted into something tangible and practical?

The term 'learning' is gaining in use, but is it just good old 'training' under a new name, or a signal of a wider and deeper understanding of the nature of learning at work?

This study set out to explore the notion of 'learning' in organisations and especially the relationships between business needs, learning strategies, practical activities to facilitate both individual and organisational learning, and the development of the learning function within organisations.

1.2 Learning and strategy

We define 'learning' to cover both individual and organisational learning, including team learning. It includes

- the learning gained from formal training courses and programmes
- e-learning
- personal forms of learning support such as mentoring and coaching
- experiential learning - through projects, action learning and job experiences, for example.

'Strategy' in the area of learning may be formal and explicit, but may also be implicit and part of wider strategies for the organisation, its culture and people management approach. Strategy is taken to be about direction and approach, not a detailed plan of activity.

The report uses the 'learning function' as a shorthand term for whatever structure or function - normally within or close to HR - is responsible for supporting the business with employee training and development (T&D) activities, learning resources and interventions designed to facilitate individual or organisational learning.

As the research evidence will show, part of facilitating both individual and organisational learning is to influence the organisational culture and work environment as this work context has a major impact on learning.

The terms 'learning activities' or 'learning interventions' are used to describe this rather wide range of activities now used to support learning.

1.3 Research questions

A set of more specific research questions was framed, exploring learning strategy, methods of supporting learning and delivering T&D activities, and the structure and resourcing of the learning function. Research also focused on the links between these three key components.

The main research questions are:

1. What is the nature and content of learning strategies in employing organisations?
2. How do learning strategies align with business and HR strategies?
3. How are learning strategies translated into practical learning activities?
4. How do learning strategies address the assessment of learning effectiveness?
5. How are research evidence, theory and ideas influencing learning strategies in organisations?
6. How is the learning function in organisations responding to the strategic demands on it?

The model in mind at this early stage is shown in Figure 1. The central hypothesis of this research...
was that it should be possible to translate business priorities into a learning strategy - and from there into practical learning activities and an appropriate learning function to support this.

The early stages of the research, especially the literature review, were used to develop the initial questions into a more specific agenda. This expanded version of the research questions is in the Appendix.

1.4 Research approach

The research questions have been addressed through an inter-linked series of activities.

- Identifying key issues in learning from existing research literature and using these issues to frame the research questions more specifically and relate them to each other.
- An e-mail survey of CRF member organisations was used to seek some simple information on their learning strategies. Eleven organisations responded to this survey, not including those who also contributed as case studies. Quite a few sent supporting documents which gave quite a rich view of their approach to learning strategy and delivery. This material has been used anonymously to inform the overall project findings.

- **In-depth interviews** have been conducted with leaders of the Employee Development, Learning or Training functions in nine major employing organisations in varied sectors. The interviews were based on an expanded version of the main research questions.

- Interviews were augmented by other documents from these organisations on learning and business strategy, overviews of learning activities, and summaries or charts of the learning function.

- **Dialogue** with seven experts who were practitioners, consultants or academics in the fields of employee and organisation development. This was used to generate a thought-piece on a particular issue or topic relevant to learning strategy. The topics were informed by the literature survey and by the issues which the case study organisations were finding more challenging.

1.5 Key themes from the literature

This research report builds on a CRF programme of work over the past nine months on the theme of ‘learning’ - as shown in the box below.

Programmes related to this project include a masterclass for CRF members on Effective Workplace Learning and a workshop featuring Stuart Winby’s work on Knowledge and Learning - Spreading and Embedding. Post-meeting notes are available to CRF member organisations on both events through the CRF website.

The recent CRF Publishing report, *The Future of HR: Creating the Fit for Purpose Function*, deals in more depth with issues concerning the developing nature of the HR function.

There is an enormous literature of potential relevance to this project and just a few of the important themes are foreshadowed in this brief literature overview.

Many re-emerge in the thought pieces for Chapter 2, where some of the most important theoretical ideas are explained in greater depth and referenced more thoroughly. Several of these themes also concern the learning leaders in Chapter 3.
Why should we bother with learning? The national backcloth

The UK workforce is not well-educated by international standards, with weak key skills at low and intermediate levels (Campbell et al 2001) but strengths at the highly qualified end of the labour market. This makes it likely that the majority of the UK workforce are ill-equipped to be 'self-managed' learners in the workplace. Government policy on skills has been to encourage lifelong participation in learning and especially to achieve targets for proportions of cohorts achieving high level qualifications.

There has also been a strong emphasis on variously-named basic, core or key skills - most often literacy, numeracy and the use of ICT.

Although management and leadership capability has been of continuing concern to both to employers and government, it is unlikely that it lies at the root of the UK's low productivity (Porter and Ketels, 2003). If organisations invest in management and leadership development, they would do well to focus it at junior management levels (Keep and Westwood, 2003).

Learning strategies in organisations

The history of developing 'strategies' for training and development, linked to business needs, goes back a long way. Casner-Lotto (1988) devoted an entire book to over twenty examples of training strategies of US organisations. Although the language is older, virtually all currently popular ideas underpin this book - the ideas of

- business process improvement via training
- continuous learning processes
- the application of technology through learning
- linking training to wider HR practices.

Mayo (1998) gives a very clear approach to the process of 'creating a training and development strategy.' This book addresses the links with both strategic and more immediate business drivers. It advocates a 'focused approach' to learning in which T&D activities are clearly focused on business success. It also covers the various options for resourcing the learning function.

... alignment of training with the business rather than training spend is the critical factor.

Recent work by CIPD has been exploring the shift 'from training to learning' as the basis for a new generation of organisational strategies for learning and development. Reynolds (2004) provides a useful overview of this thinking.

The CIPD website also provides interesting practical examples of learning strategies in current organisational settings.

Linking training and development with organisational performance

Training emerges as one of the bundle of so-called 'high performance work practices' which are associated with superior organisational performance (Huselid, 1995; Pfeffer, 1998), but such studies show correlation not causation.

A few studies are starting to show cause and effect in the relationship between training and business performance (Thompson, 2000; Mabey and Ramirez, 2005). It seems likely that it is the alignment of training with the business rather than training spend which is the critical factor.

Very useful UK studies of the relationship between HR practices and organisational performance have been conducted by Guest et al (2000) and Purcell et al (2003).
Guest makes a most useful distinction between individuals possessing skills or knowledge and their willingness and ability to deploy these skills in the interests of the organisation. Guest, Purcell, Mabey and others also emphasise the importance of the quality of implementation of HR practices (including training), rather than their mere presence.

Considerable effort has gone into trying to show the business impact of management development ... with little hard evidence.

An exhaustive literature review on this subject by Burgoyne et al (2003), scanning thousands of articles and examining hundreds in detail, found remarkably little hard evidence of business impact. Many studies show that individuals feel that management development improves their skills, but very few studies show how this translates into improved individual performance on the job. And this is still one step away from showing improved organisational performance.

Evaluating the impact of training and development activity

The Kirkpatrick approach to training evaluation (1983) is familiar to training and development practitioners in the UK and has been around since the late 1960s. It suggests four 'levels' of impact of learning.

• Reaction - reaction of participants.
• Learning - acquired knowledge.
• Behaviour - behaving differently.
• Results - business results.

Tamkin et al (2002) gives a useful summary of the Kirkpatrick approach and all its later variants, and the advantages and limitations of these methods.

Proving 'results' and, by extension, measuring the return on investment (ROI) in learning has long been advocated - see, for example, Kearns, 2000. However authors are at last beginning to confess that this is something of a pipedream for all but the most contained training interventions. Creelman (2004) advocates a mix of hard and soft indicators of impact and a more relative than absolute approach to assessing likely business value of different options for investing in learning.

How individual learning takes place

Many areas of HR are very light on theory. Learning is the reverse. Some theories only just recently gaining ground in organisations have been around for well over fifty years. Some of the most influential are as follows.

• Kolb's (1984) learning cycle, especially the idea that reflection is a crucial step in the learning process.
• Argyris' (1994) concept of double-loop learning and the need for change in our fundamental assumptions to open the way to the most powerful forms of learning and change.
• Revans' (1980) development over a long period of time of the idea of action learning - central to many current views about the importance of experience in the most vivid learning.

• Honey and Mumford (1982) proposed that different people prefer to learn in different ways - so called 'learning styles'.


Declaration on Learning

The Declaration on Learning was published by a collection of people who have been working in learning for many years - see Honey and Kandola, 1999 and Peter Honey's website, PeterHoney.com. Its signatories were Margaret Attwood, Tom Boydell, John Burgoyne, David Clutterbuck, Ian Cunningham, Bob Garratt, Peter Honey, Andrew Mayo, David Megginson, Alan Mumford, Michael Pearn, Mike Pedler, and Robin Wood.

The declaration links ideas about the nature of learning with challenges for its various stakeholders (including government), and the benefits of learning. At the heart of the declaration are 16 assertions about the learning process.

The philosophy puts the learner at the centre and sees learning as an emancipating process - and one which should be enjoyable. Individual learning is linked with ideas of change and organisational development.
Trends in learning activities in organisations

The CIPD’s annual training surveys give a useful overview of trends in practice in the UK. See cipd.co.uk. Hirsh and Carter (2002) summarise some of the key trends in management development practice, especially the shift from long formal training programmes towards more experiential and personally tailored forms of development - mentoring, coaching, projects, secondments, etc.

The same trends are hoped for in training and development for the whole workforce, but the more tailored and personal forms of development are very difficult to implement on a large scale.

A survey of CRF members conducted in advance of a recent CRF workshop on Developing High Potentials (2004) found that managed job moves were considered the form of development with highest impact followed by expert coaching, projects, secondments and mentoring. Formal training was considered less effective by the survey respondents.

e-learning caused great excitement in the 1990s. The CIPD provided a useful commentary on the development of e-learning (Sloman, 2001), as did a CRF report (Burgoyne, 2001). Much e-learning activity was really just IT skills training and had little impact on other skill areas.

Clutterbuck (1998) gives a clear overview of both mentoring and coaching as ways of facilitating learning, and the varied roles that coaches and mentors play in development.

An earlier CRF report on employers’ attitudes towards supporting study for qualifications (Perry, 1999) showed that, while taking qualifications was often in the interest of the employee, UK employers had relatively little interest in supporting study.

A large body of literature on the merits of MBA study shows no established link with improved organisational performance resulting from either recruiting MBAs or supporting their study (Burgoyne et al, 2003).

‘Blended learning’ is a term in wide use as shorthand for the use of varied T&D methods of delivery to meet learning needs. In particular, it often implies using some form of electronically delivered materials alongside more social forms of learning.

Brennan (2003) gives some useful case examples of how US organisations are choosing types of learning activity to meet different needs. He identified four factors which should condition the choice of T&D method as:

- the **conditions** in which an approach is undertaken - time line, for example
- the **resources** available - budget and subject matter expertise, for example
- the **target audience** - location, job role, and familiarity with topic, for example
- the **characteristics of the content** - longevity and importance to competitive advantage, for example.

The learning organisation

In the UK, the idea of the learning organisation has been developing since the mid-1970s, especially through the work of Pedler, Burgoyne and Boydell. In The Learning Company (1991) they define this as an organization that facilitates the learning of all its members and continuously transforms itself. A host of what they call ‘glimpses’ illustrate what it may look like to reflect learning throughout the activity of an organisation.
Many of these glimpses are taken from real organisations. They do not propose a single ‘recipe’ but more of a mindset.

In common with other recent authors, Garratt (1999) sees the learning organisation as “more of an aspiration for a continuous process rather than a single product” - more of a way of travelling than a point of arrival.

In the US, Senge (1990) has become the best-known proponent of the ‘learning organisation’ - his principles are shown here.

Senge refers to key principles in organisational learning, including personal mastery, mental models, shared vision and team learning. For Senge, team learning is the critical link between individual and organisational learning. The manager or leader emerges as a facilitator or steward of organisational learning, but also as the person who still pulls the strings.

In The Dance of Change (1999), Senge shows how to accelerate successful change and avoid the obstacles that hold back momentum. This book explores some ‘universal challenges’ in building personal and organisational capabilities through learning - lack of control of learning initiatives, diffusion of learning, ‘fear and anxiety’, etc - and provides in-depth cases of sustaining learning and change initiatives.

Rifkin and Fulop (1997), in a challenging review of the ideas behind organisational learning, dwell on the idea of the ‘learning environment’ compared with the ‘learning organisation.’ Day (2001) picks up a related theme in the difference between leader development (developing the human capital of individual leaders) and leadership development (developing the social capital of the organisation as a whole).

The extent to which managers and leaders seek to control learning may seem a rather abstract concern, but turns out to be a major issue for practice - as seen in the case studies in this report and in several thought-pieces, including that by Chris Mabey.

Goh (1998) summarises the building blocks of the learning organisation from the literature as

- mission and vision
- leadership
- experimentation
- transfer of knowledge
- teamwork and co-operation.

He sees two other building blocks in support of these - organisational design and employee skills and competencies.

Communities of practice (Wenger, 1998) are a fast-growing mechanism for helping employees share know-how and work on issues together. They may meet face-to-face or interact electronically. See the examples below. Stuart Winby’s contribution to this report also gives

Using Communities of Practice to Support Organisational Learning

The American Productivity and Quality Center (2003) gives an example of the ‘Knowledge Network’ used by Caterpillar as a central plank of its corporate learning strategy, in tandem with encouraging Communities of Practice. There are some 1900 communities of practice organised around specific business-related topics.

The Knowledge Network offers carefully validated knowledge entries accessible through and intranets. Investment in the Knowledge Network system itself has been modest - some US$2.5 million from 2000 3 to shape and develop it. Anticipated return 2003 8 is US$75 million. A detailed RoI study estimates a minimum average saving of $10 for every $1 spent.

Griffiths (2004) describes BT’s use of Communities of Practice, especially for the large number of employees who work outside conventional offices. BT has about 500 communities of practice with 28,000 members. These are supported in all cases by both a community owner and a community coach, with administrative support for larger communities. There is a ‘community charter’ which sets the framework and guides behaviour.

The coach is, in many respects, the heart of the community, shaping and driving the sharing and learning processes. This is a junior/middle management role that requires (and develops) skills in culture change, coaching and mentoring, plus an interest in technology. The coaches have their own network site on the intranet, with live events to boost interchange and peer learning, and a supporting library of materials. This role has evolved rapidly from part-time volunteer to mandatory title to recognised job title, with an important part to play in influencing the business.
insights into this idea in practice.

The role of the line in developing others

The role of line managers in supporting learning is a theme in much of the literature already referred to above. It is also the cornerstone of most strategies we see in this research. However there is a continuing stream of evidence that employees in the UK do not feel well led and do not see managers as very good role models of the supportive behaviour so often contained in values statements and competency frameworks (Horne and Stedman Jones, 2001).

... gone are the days when directors were 'above' the need to learn.

Another strong theme in the literature is the need for continuous learning to be supported and role modelled at the very top of organisations - in the Board as a team as well as with the CEO as an individual.

The CRF masterclass on Effective Workplace Learning (2004) included an input from Bob Garratt on 'learning at the top' which highlighted the importance of learning among directors and Boards - especially as corporate governance issues have become more pressing and professional investors more enquiring. Gone are the days when directors were 'above' the need to learn.

Cunningham (2005) provides some very practical tips for learning and development professionals who are seeking to obtain support for learning from business managers. This source echoes several of the themes which we will see in the learning leader perspectives in Chapter 3 - especially the need to balance a strong customer-orientation towards managers with the independence to know when they are not asking for something sensible.

IES has conducted several research studies into the role of line and senior managers as supporting learning. Tamkin et al (2003) compared strategies which develop the skills of leaders and hope they will change corporate culture with those which try and change the culture first and hence encourage managers to change their behaviour.

An empirical study by Hirsh et al (2004) into the way managers develop other people in the workplace showed that this is more a matter of inclination or desire than skill. In other words, managers who wish to develop others teach themselves how to do it. There were, however, some common patterns of behaviour in managers who developed others effectively.

In particular they took a 'whole person' approach and created a team environment conducive to open discussion and learning.

So the emphasis on 'manager as coach' and 'coaching skills' may be advocating too narrow a model of what managers really need to do to encourage learning.

The HR function and training and development function

There are a number of changes occurring to the organisation and resourcing of HR work. Ulrich (1997) has been very influential here, especially with the idea of HR as a 'partner' to the line. In the UK we see the shared service model of HR gaining in popularity (Reilly, 2000). Here, the 'transactional' aspects of HR being stripped out of the main business and put in a back office operation, fronted by a call-centre style enquiry service.

This often leaves the 'business partner' as the person embedded in the business, offering some advice to local management and 'managing' the provision of service to them.

... learning activities cannot be delivered in the same way as payroll or personnel records.

A study of the training and development function (Carter et al, 2002) showed that the shared service model of HR needs some considerable adjustment to work well for training.
and development. This is mostly because learning activities cannot be ‘delivered’ in the same way as payroll or personnel records.

This study showed that organisations are struggling to find training and development professionals with the required mix of specialist training expertise and business understanding.

Rothwell W (2004) found four main types of role in the learning function in the United States:

- learning strategist
- business partner
- project manager
- professional specialist.

In examining the skill needs of the Chief Learning Officer (US terminology), he suggests the CLO “should focus on the learning strategist and business partner roles - and rely on other people to carry out the project manager and professional specialist roles.”

The skills which seem most critical for CLOs are thinking strategically and applying business acumen.

The Carter study above, in the UK, came to similar conclusions about the shifting roles and skills needed in the learning function, also emphasising the need for very strong influencing skills.

1.6 Structure of this report

During the dialogues with both learning leaders in organisations and thought leaders outside them, the idea of ‘personal perspectives’ became central to this research project. Learning is such a complex and broad issue in organisations that there are many ways of thinking about it. Even the learning strategy of an organisation is not seen in exactly the same way by different people.

So it seems more honest to treat the organisational case studies in this project as personal perspectives. This also allowed the individuals involved to select ideas they found most useful and powerful and not try to cover all the issues and processes of potential relevance to this project.

In writing this report and drawing on a very large volume of data, it is also apparent that these conclusions are the personal perspective of the author. A different researcher having the same conversations may have been struck by different issues.

The structure of this report presents a range of perspectives from which readers can take what is of value to them.

Chapter 2 presents seven perspectives from ‘thinkers’ in this field who help to summarise existing research and theory as the context for their own ideas about good practice and challenges for organisations.

Chapter 3 presents nine case study perspectives from ‘learning leaders’ in organisations in which they describe how their learning strategies are being shaped and delivered.

Chapter 4 develops a model of learning strategy and illustrates the nature and content of learning strategies from the perspectives collected. Issues are flagged as they emerge from the research findings.

Chapter 5 summarises the shifts in thinking and activity which seem to be occurring, and concludes with some key questions for organisations. These address some of the deeper challenges in implementing current visions of learning in organisations.

The detailed research agenda is given as an Appendix to the main report so the reader can use it for further reflection or as the basis for reviewing their own organisation.

All references, some suggested items for further reading and useful websites are put together in a single bibliography at the end of the report.

Readers wanting an overview of the key findings can skip to Chapter 5 or use the Executive Summary.
2 Perspectives from Learning Thinkers

Learning is an area of continued research interest across several disciplines, and there is an enormous volume of published literature. This section builds on the very brief literature overview in Chapter 1 and presents some of the key ideas and debates on learning in organisations through short personal perspectives from some leading thinkers in this field. They have varied backgrounds, including a lot of practical experience and theoretical insight.

2.1 John Burgoyne: The nature of individual and organisational learning

In designing and implementing a learning strategy, we need to base our efforts on our evolving understanding of how individuals learn at work, and what it might mean for an organisation to learn.

'Natural' learning

Much learning that contributes to performance in the workplace occurs 'naturally' - i.e. without deliberate facilitation. People learn just by doing their job, watching other people, and so on. It is important to realise this and make the best of it. Of course 'natural' learning is no longer 'natural' if it is managed. However a lot of methods, like mentoring, originate in spotting something that happens naturally and trying to make it happen more systematically.

'Context sensitive' methods like coaching, mentoring and action learning are attempts to facilitate natural learning processes.

Learning companies and organisations function partly by having cultures and leadership styles that make them fruitful places for natural learning - through cultures emphasising problem-solving and learning, rather than blaming and punishing.

There is an analogy here with the world of medicine. Much of the time we stay healthy because of our immune systems, and healthy lifestyle habits. Sometimes we go to doctors for treatments or medicines for specific health problems. Natural learning is rather like a healthy lifestyle. Formal learning interventions are more like a trip to the doctor. Health is as much served by creating healthy environments and health education as it is by specific treatments for ill-health.

Organisational learning strategies need to balance the use of specific interventions to cause learning (training, education, etc.) and initiatives to create environments to support natural and self-managed learning.

The training of managers and leaders to be coaches is a step in this direction, but these skills take time to acquire, as does adjustment to this change in the role of the manager. There is also a need for training and development professionals to act as facilitators to foster 'natural' learning in the workplace.

Systems and social theories of learning

Much training practice is based on early theories of learning - behaviourism and cognitive learning theory. Humanistic and developmental theories have also had their influence.

... we still design everything on the basis of Newtonian physics when the theory has moved on to relativity and quantum theory.

There are many strands of newer learning theory including:

- activity theory
- actor network theory
- critical realism
- dialogical learning.
Newer theories see learning as much more connected and social, not just something that goes on in the individual. (Burgoyne, 2002, reviews some of these theories).

This shift in ideas about learning leads us towards learning interventions which are more explicitly linked to how the individual will accomplish their tasks and use technology, and how the individual will work with others in a social setting. But these newer learning theories are yet to be widely exploited in corporate settings.

It is as though we still design everything on the basis of Newtonian physics when the theory has moved on to relativity and quantum theory.

The ‘learning organisation’ and ‘social capital’

Organisations, not just individuals, learn. One way of thinking about the difference between individual learning and organisational learning is to see education, training and development as aimed at the development of ‘human capital’ (at the individual level), and organisational development (OD) as aimed at developing ‘social capital’ at the collective level.

Leant capability is ‘social capital’ (a property of the community) as much as ‘human capital’ which is the sum total of individual ability.

Aligning learning with the business and the psychological contract

In corporate settings, employee learning is both a condition of being able to implement new business strategies, but it also develops the insights from which new strategies come. So, learning can drive business as well as the more conventional assumption that business should drive learning. The virtualisation of organisations and the move to the knowledge economy means that learned capability and knowledge is core to the business process, for the individual and the organisation - not a sometimes useful enabling condition.

The HRM Performance theory and evidence that suggests that HRM works best when it is an integrated bundle of practices, also applies to learning.

So, training and learning strategies and activities may not have much effect unless they are integrated with reward, job design, career management and other HRM practices that locate the person in the organisation and determine what they can and want to do.

Management and leadership are fundamentally different from other kinds of work in organisations, because they generate meaning and structure rather than apply it. Managers and leaders need to address problems and challenges to which there are no pre-existing solutions.

People can be trained to do ‘programmed’ work (as defined by Herb Simon), but have to be developed to carry out the ‘unprogrammed’ work of management. Such development cannot have precise behavioural outcomes defined in advance, as its aim is to equip people for unforeseen situations.

Learning only contributes to organisational performance when what people can do, through learning, is aligned with what they have the opportunity to do via career opportunities. People make their own choices about using their learnt skills or not - and the psychological contract over career and learning has to be right for them to do so.

In the virtual, knowledge-based organisation, employees rather than the firm own the ‘means of production’. Knowledge and learning are difficult to own. This radically re-draws the playing field in relation to capability and learning.

People work ‘in and around’ rather than ‘for’ organisations these days - organisations are becoming arenas where knowledge workers operate.

Some practical implications

Just as training needs to take on board the newer theories of learning, so there is potential for a new kind of OD that harnesses these ideas. ‘Practice’ is a useful concept here, being both doing and learning, individual and collective. The growing interest in ‘communities of practice’ is one concrete example of encouraging more
social and systemic learning, connected intimately with real work tasks.

Some ‘hybrid’ learning initiatives combine both individual and collective learning - for example, training events designed to bring together teams from each of a number of organisations. These can combine traditional individual learning with team learning - through a shared real-life project for each team, for instance - and learning between the different organisations involved.

**Much e-learning has taken us back to earlier learning theories rather than forward.**

Some recent trends sit less easily with ideas about learning. For example:

- Outsourcing training is a large scale phenomenon that is proving difficult to manage. The advantages of flexibility and resource economy are in tension with alignment with organisational processes, and the necessary ‘situatedness’ of many important learning processes.
- Much e-learning has taken us back to earlier learning theories (based on information transfer and tell-test models) rather than forward. Enthusiasm and retreat has followed the pattern of dot.com boom and bust. The field is ripe for a radically different second generation approach to e-learning. In the long term it is going to be a major force as part of the virtualised organisation.

**The next and best stage is evaluation-led learning development strategies - starting from what we know from previous evaluations of similar learning interventions and challenges in our own organisations or elsewhere.**

### 2.2 Michael Eraut: Learning in the workplace

The observations made here are based on extensive empirical research across a number of projects. These have examined the learning of professionals at varied career stages in a range of occupations and sectors including engineering, financial services, accountancy, nursing, medicine and teaching. The research method used has included workplace observations and interviews with individuals and their managers.

Three questions have been particularly useful in eliciting people’s understanding of the real nature of learning in organisations.

- What is being learned?
- How is it being learned?
- What are the main factors affecting this learning in the workplace?

**Learning from experience**

The learner-centred perspective used in this research showed that formal education and training provide only a small part of what is learned at work, even for young professionals going through rigorous schemes of training. Most of the learning described was non-formal, neither clearly specified nor planned. It arose naturally out of the demands and challenges of work:

- solving problems
- improving quality and/or productivity
- coping with change
- social interactions in the workplace with colleagues, customers or clients.
Responding to such challenges entails both working and learning. One cannot be separated from the other. In retrospect, it may be described as learning from experience.

Much learning at work derives its purpose and direction from the goals of the work, which are normally achieved by a combination of thinking, trying things out and talking to other people. Sometimes, however, people recognise a need for some additional knowledge or skill that seems essential for improving the quality of their work, expanding its range or taking on new duties.

Learning goals are identified which they pursue by a combination of self-directed learning and taking advantage of relevant learning opportunities as and when they appear. Although this can involve some formal training being undertaken, it almost always requires learning from experience and from other people at work.

Learning from other people

Learning from other people is sometimes facilitated by organised learning support. This may be organised formally by the centre of the organisation or informally at local level. As examples

- apprenticeships and trainee schemes are usually organised centrally
- mentoring, shadowing and coaching are more likely to be arranged locally, and they are generally more effective this way.

The most common form of learning from other people takes the form of consultation and collaboration within the immediate working group - this may include teamwork, ongoing mutual consultation and support or observation of others in action.

Beyond the immediate work environment, people sought information and advice from other people in their organisation, from customers or suppliers or from wider professional networks. This was often done on a reciprocal basis.

Only a minority made frequent use of written or audiovisual materials like manuals, videos or computer-based training. The rest tried to circumvent materials by getting the information they needed from other people.

Work based learning to reinforce off the job training

Working for qualifications and attending short training courses were important for some people at particular stages in their career. But even then, work-based learning was important in developing the ability to use what has been learned off-the-job. This was especially true for short courses, which have very little impact unless they are appropriately timed and properly followed up at work.

Generally, initial training was judged better when it was both broad in scope and involved periods in the workplace as well as in the classroom. Mid-career management and professional qualifications were judged highly effective because they were able to build on prior experience at work. Management courses involving small groups and projects played an important role in helping people shift their thinking from operational to a strategic level.

Our evaluation of Higher Level N/SVQs in Management found that using a more developmental approach to working for a NVQ resulted in significant impact on current and future practice - whereas an accreditation of current competence neither had an impact on practice nor shortened the time taken to get the qualification.

The crucial role of the line manager

The critical factors affecting the level and direction of learning efforts are:

- the microclimate of the workplace
- the self-confidence of the worker
- the role of the local manager.

Local managers influence both the climate and individual dispositions through proactive attention to social relationships, mutual learning and good feedback. They influence learning
opportunities through organising work to provide the appropriate level of challenge and support for groups and individuals - and to ensure participation in an appropriate range of work activities.

But local managers are rarely trained for this important aspect of the job. To appoint managers and develop them for this role would be a highly significant move towards the promotion of learning in the workplace.

Our recent research also indicates that these same factors play an important role in promoting retention of staff. All our research has shown a close relationship between informal workplace learning and the improvement of quality - indeed the two are inseparably intertwined.

This suggests that cost benefit analyses should not be focused on learning alone, but on the tripartite package of learning, retention and quality improvement.

Our three recommendations to improve learning would, therefore, be as follows.

1. To train managers for the role of promoting all three outcomes (ie learning, retention and quality improvement) in an integrated manner.
2. To develop effective approaches to planning and conducting such training.
3. To develop ways of encouraging and supporting managers in this new role.

Contact m.eraut@sussex.ac.uk for further information.

Several relevant papers can be found at http://www.tlrp.org/proj/Workplace.html, under ‘workplace learning’ and ‘publications’.

2.3 Chris Mabey: Some systemic reasons why learning fails

There is no doubt that approaches to training and development have become more sophisticated in recent years, along with a sharper appreciation of how true learning can be cultivated. Yet too often the learning outcomes of well-crafted training interventions remain unmet. Why is this?

Given the relentless pace, fragmented, discontinuous and largely unreflective nature of much managerial work, it is not surprising that managers frequently turn to training ‘packages’ - often advertised as the solution to a universally pre-existent problem. In describing the shortcomings of so-called genre training which seeks a choice of solution from a limited range of prescribed options, Mole (1996) quotes Katz and Kahn:

"Attempts to change organisations by changing individuals have a long history of theoretical inadequacy and practical failure. Both stem from a disregard of the systemic properties of organisations and from the confusion of individual changes with modification in organisational variables." (1978:658).

The result is a poor matching of training provision to actual learning requirements and a failure to understand the situational factors that shape behaviour.

Authority structure

One systemic feature overlooked is the prevailing authority structure. The overt intention of training is to improve skills and modify behaviours - more ambitiously it is designed to change attitudes, to release talent, to encourage innovation and stimulate organisational learning. Rees (1998) describes four UK organisations where many of these more ambitious goals were pursued through quality management programmes, including various training and development initiatives.

His conclusion was that while ‘detailed control’ at the point of production or service delivery passed to employees, management increased their grip on ‘general control’.

Unsurprisingly, the hoped-for learning fails to materialise.

Despite well conceived training, the structure of authority in the respective companies was not
radically altered. This failure to think systemically is not untypical and undermines the learning dividend of many training interventions. Despite the promise, a small step forward in the negotiated order takes place - rather than a radical overhaul - due to the incipient resistance of existing authority structures. Unsurprisingly the hoped-for learning fails to materialise.

Faced with such structural resistance, employees will adapt, accommodate and improvise around organisational procedures. Beattie and McDougall (1998) found that in peer mentoring relationships in two Scottish voluntary sector organisations, mutual learning was more likely to occur where no formal structure existed.

In other words, where such relationships are imposed on employees (ie, mentors chosen for them) and/or where the relationship is hierarchical (ie, boss-subordinate), effective and supportive peer mentoring relationships tend not to develop. Interviewees revealed that, under these conditions, it was difficult to develop communication, mutual support and collaboration essential for effective learning to take place.

Executive coaching

Many organisations are introducing executive coaching. The opportunities for genuine learning appear to be immense given the intense, repeated and highly personalized intervention of a skilled coach. But how many organisations have anticipated the systemic repercussions?

In a study based on interviews with six senior coaches at a major high street retailer, Mabey (2003) uncovered more questions than answers.

- How can a strong corporate HRD agenda co-exist with a number of senior executives pursuing highly individualised development? The coaching followed selection for, and success at, an assessment centre?
- How can the degree of scrutiny and control exercised via an assessment centre be the prelude to an empowering learning experience?
- Is it not incongruous to start a process intended to promote personal discretion, self-determination, honesty and self-disclosure by corporate decision-making described by one participant as ‘black art’?
- How can such contradictory discourses run in parallel, one inferring that executive coaching facilitates personal growth, maturity and partnership and another which indicates an enduring reliance on authority figures?
- And, given the original espoused intent, how tolerant is the organisation towards individual learning which has no immediate and demonstrable impact on corporate objectives?

Cultural factors

The answers to these questions are cultural as much as structural. Cultures are significant because they define and encourage established skills, habits, taken-for-granted ways of thinking and behaving. A way of considering the cultural factors which impinge upon the development of learning in a particular work setting is to ask the following questions.

- What kinds of factors are operating which militate against change?
- Which beliefs, habits, actions are rewarded and which are seen as unacceptable?
- How is learning achieved, problems solved and performance analysed, reviewed and reported?

Resistance to learning is usually encountered from those who may have most to lose from, or feel most threatened by, intended changes (Argyris 1987). Such patterns of anti-learning behaviour become so embedded in the culture and so entwined in the unequal distribution of power that they are rarely challenged.

Achieving learning

Achieving genuine individual and organisational learning, then, requires activity on a wide range of fronts. It demands serious, far-reaching and probably uncomfortable commitments and changes from senior managers, penetrating to the very basis of the organisation.

The way the senior team define their role, and their relationship with the rest of the organisation is an example.
The necessary structural changes require

- new work arrangements
- a thorough break with traditional managerial elitism
- sincere efforts to attract the commitment of the workforce
- genuine reliance on worker initiative and creativity.

This may imply a reduction in managers’ traditional conception of their ‘right to manage’, which often means the right to make decisions in ways which are unaccountable and undiscussable.

This is not to say that management development which is well integrated with strategic objectives cannot be effective for individuals and of value to the organisation. It can.

Indeed recent research demonstrates that a thoughtful approach to management development, pursued over a sustained period and aimed at developing individual potential, actually differentiates superior performing from average companies (Mabey and Ramirez, 2005).

However, a key ingredient in this success was credibility. It was crucial that those on the receiving end of development initiatives regarded their employers’ efforts as more than short-term instrumentalism and shallow rhetoric.

As long as training interventions ignore or neglect these wider systemic features of organisational life, as long as residual patterns and structures of power, privilege and secrecy persist - and as long as trainees doubt or mistrust the motives and integrity of the training in which they are participating - any synergistic learning which is productive for employee and employer alike, is likely to be sporadic, localised and short-lived.

2.4 Andrew Mayo: Learning strategy - business driven, not just business linked?

‘Learning’ and ‘strategy’

There still seems to be confusion about both these terms in practical use. Although it is common to use the term ‘learning’ in job and department titles, it is often a mask for a continuation of programmes of training events.

A ‘learning strategy’ will include how learning is delivered, but should be just as much about a ‘learning culture’ - which embraces:

- defining and promoting values and behaviours, such as curiosity, openness, innovation, no-blame, experience sharing, comprehensive feedback
- processes and tools that bind together and enable those behaviours, such as knowledge management, career development, learning needs definition, design of learning processes, self managed learning, rewards and recognition, and so on.

The term ‘strategy’ is also confused. Despite the obsession to be ‘strategic’, HR and HRD people often find it hard to distinguish between goals, processes and plans. If they confine themselves only to the broad ‘umbrella’ picture, they risk making generic motherhood statements which could apply to any organisation. What is important is to be clear about ‘what we believe about people development’.

The ‘we’ here should not be the often idealistic fashion-driven HRD people - but should be the relevant (ie local) senior management team.

How often is a strategy formulated? Few organisations start from nothing - there is an implicit strategy even if it is not explicit. Systematically or opportunistically, choices have been made, and this is what strategy is about.

The real question is - how is it reviewed as the business changes and develops and who is involved?

This is best done by ‘zero-basing’ the needs and then matching against the current activities to reset the portfolio and the priorities.
I suggest in my book on training and development strategy (Mayo, 1998), that some systematic thinking through those choices and priorities is worthwhile, and that there are three basic components of an HRD strategy:

- that which is semi-permanent and embraces policies, processes and programmes which support the mission, vision, values, beliefs and core competences of the organisation
- specific initiatives derived to support the goals (or problems) of business divisions and departments currently
- the internal (or professional) strategy of delivery.

It helps also to have sub-strategies for each defined population - subsets of the organisation that have common learning needs.

HRD strategy and business strategy

Everyone wants to see these linked. But ‘linked’ may not be the right word - ‘driven by’ might be better.

I find few organisations seriously start with business goals and objectives and work them through to specific learning objectives.

A classic here is leadership development - often ‘having a programme because the business needs better leaders’ (a so-called business based rationale?) results in heavy expenditure for little visible benefit. If they had worked through what leaders needed to be better at in order to deliver business strategy - rather than assume it must be based on the HR-derived competency framework - they might design a programme of real benefit.

Especially in the public sector, although they say all learning has to have a business benefit, in practice they do much that is around a political agenda - whether needed by the learners or not - and for (very) personal development.

It’s fine to do these things, so long as we are honest about their objectives and don’t create spurious links to some ‘business benefit’ that could never be proven.

Stakeholders in the learning process

If we espouse a ‘learning culture’, then by definition everyone in the organisation has to be a stakeholder and involved in some aspect. But even in a specific learning initiative, the groups who have an interest in that initiative extend beyond the learners and the L&D department. It will involve the learners’ managers of course, but too much emphasis can be put here - others may include senior management, colleagues or subordinates, even customers or the public.

So a key part of a strategy is to think through the different roles in learning, and the knowledge and skills that need to go with them to fulfil those roles effectively. ‘Learning to learn’ is a curriculum in itself.

Building, or revising, a strategy will involve a series of dialogues with all of these stakeholders. This is a good time to check how people perceive the reality against the ‘espoused’ in cultural and behavioural terms.

The acid test

At the end of the day, perhaps the acid test is how the professionals, members of the L&D department, spend their time. How does it match up with the goals and aspirations of the strategy, at organisational, team and individual learning levels?

2.5 Graham Prentice: Recognising the nature of learning in achieving business change

These reflections are based on varied experiences as an HR practitioner, training and development specialist and line manager.

Aligning learning priorities with underlying business needs

Approaches to learning and the articulation of competencies need to be thoughtfully based around an understanding of the need for change in a particular organisation. This is part of the job of the reflective practitioner. For
example, Nestlé has had a culture which has been driven by hierarchy, so we have been placing more emphasis on the courage to speak out, and the related ability to give and receive feedback.

In one of our Latin American markets where we were facing a major change we used Torbert’s model of effective dialogue - framing, advocating, illustrating, and enquiring - to improve the line managers’ ability to hold more effective discussions about performance. This was particularly useful with senior managers who were going to have dialogues about the personal nature of change.

A global behaviour framework was launched two years ago as part of global best practice. One of the key behaviours in this framework is ‘insight’ - the ability to make meaning of facts, ideas and situations.

I feel the development of insight improves the cognitive maturity of our people, especially our managers, and thereby their job performance. If people were better at making connections in their thinking, this would lead to improved decision-making based on sound judgement. In addition they may have greater insight into their own and others’ learning.

Since all learning starts with the individual, understanding this insight process is critical.

Communicating in business language

Writing big documents about skill needs and learning strategy has little impact. Over the last couple of years, we have been implementing a global framework for leadership behaviours across all markets, closely linked to our major business change programme. The language being used is straightforward and makes a strong link to behaviours and the context - the environment where the managers exercise those behaviours. We are highlighting four clusters of behaviour.

- Opening up.
- Dealing with others.
- Adding value
- Inspiring people.

‘Opening up’ is a fundamental first step, comprising both openness with others, but also openness to knowing yourself. I have a strong personal belief that the context is easier to change than individual behaviours. Issues on the latter are better addressed by effective recruitment. Context touches the heart of OD work.

Learning as a personal and positive process

If training is to be internalised and is to make you do something differently, then the reflective part of the learning cycle needs to be encouraged. This is the aspect missing both in much training design and in many corporate cultures.

Learning needs to lead to improved job performance but is also necessarily about the self.

The same is true of experiencing and adapting to change. In thinking and talking about learning for business we are apt to forget this.

Business finds the personal nature of learning quite difficult to deal with. Line managers need to understand this when supporting the learning of others. You need to personalise learning and change to make it happen - to ask ‘what does this change mean for you in terms of what you do in your job?’

For this reason we have defined development under our global best practice initiative Develop People as

‘... a proactive responsibility for learning about myself in my work so that I can stretch myself to perform even better. It is a recognition that only I can manage my learning but my manager/team can support me with the right kind of challenge and encouragement.’
It is also important to remember that individuals are not isolated as learners. Relationships and the interaction between people are fundamental to the learning context.

_We also need to position learning as a positive experience. People learn best when they are feeling confident of their ability. Learning must absolutely not been seen as remedial. So building confidence (self-efficacy) as part of the learning process is essential._

**Making learning strategies real**

So how do we reflect such ideas about the need for change and the nature of learning in practical activities?

- **Getting the direction** well understood and shared by the whole HR community. In Nestlé for our best practice Develop People initiative this has been a global process involving all HR Directors, line managers and country boards.

- **Reflecting the nature of learning** in the design of interventions. For example, always building in time for both reflection and discussion - giving people space, which they do not have in a task-focused culture.

- **Shifting the emphasis in performance reviews towards open dialogue** by, for example, encouraging more in-depth discussion of just a few skills or behaviours most important for the job. The review should also cover and record strengths as well as development needs. We are encouraging longer term as well as short-term development goals, and personal as well as job-focused development.

- **Finding ways to share collective experience and knowledge.** Nestlé is exploring ways in which functions can share, record and spread best practice within the company. It has a global best practice site, with maturity profiling being a key part of implementation country by country. This is a practical approach to organisational learning.

- **In addition, global information management systems** are being implemented as part of a major change program. We should not forget a basic fact - to know can be as simple as basic access to information.

Learning needs to be like breathing ...

The central challenge, whatever interventions are used, is to keep real attention on learning and not let it become mechanistic or just seen as a necessary cost.

Learning needs to be like breathing - easy access to ‘oxygen’ needs to be a simple process. We have to keep reminding ourselves that we are not as good as we think we are, and that we can be even better. Learning is how we achieve this. **In summary.**

- Learning is a personal process - get payback by giving time for dialogue.
- Understand how reflection and insight deliver effective learning.
- Ignore the local context at your peril.
- Pay attention to recruitment. It may be your root cause as to why there is a need for learning.
- Keep the learning process as simple as possible. It should be like breathing.
- Listen carefully to the dialogue about what the business is wanting. Do not be afraid to say ‘learning is not the solution to this need’!

2.6 Martyn Sloman: From training to learning - the new driver of excellence

Business rhetoric speaks of people as a source of competitive advantage and employee development as one of the key levers for delivering a high performance workforce. But what are the more practical implications of this acknowledgement of the importance of employee development for the strategies and practice of learning, training and development in the organisation?

**Central challenge**

*CIPD sees the central challenge for the HR profession is to move from a strategy based upon the delivery of training, to one based upon the support, direction and acceleration of learning.*
What can and should be done must depend on the situation, culture and background of the organisation. This affects the contribution that the function can potentially make to the achievement of business objectives - as does the credibility and perceived quality of the people in the learning and development function. Context is critical.

However, research and case study investigations have shown that a broad paradigm shift is required. Interventions and activities which are intended to improve knowledge and skills in organisations will increasingly focus on the learner. Emphasis will shift to the individual learner (or the team) with encouragement to take more responsibility for their learning.

Efforts will be made to develop a climate which supports effective and appropriate learning. Such interventions and activities will form part of an integrated approach to creating competitive advantage through people in the organisation.

Eight propositions for a learning framework

CIPD is suggesting eight propositions which, taken together, offer the framework in which the modern HRD Professional can construct his or her strategy and action plan to achieve this shift in focus.

1. Recognise that learning is more important than training. This shifts emphasis from the delivery of content to the development of learning capabilities. Paying greater attention to developing adaptive capacity, in addition to specific skills for current work, provides the flexibility to cope with future change.

2. Clarify how learning underpins the business strategy. The most important question that the training and learning professional can ask is 'What do my Chairman, Chief Executive and Board deem to be the most important contributions that individual and team learning can make to the business?' It is by demonstrating that they are delivering on these issues that the training and learning function achieves credibility and hence influence. The links between learning and business strategy must be clarified and articulated throughout the organisation.

3. Identify and remove the barriers to learning. CIPD research has shown that time to learn is often the biggest constraint for the learner, and senior managers need to be involved in protecting access to learning when work pressures make it too easy for line managers to withdraw their staff from development activities.

4. Design interventions with the learner in mind. This means taking account of individual differences in preferred learning styles and their readiness for learning at a particular time. It also means responding to the power of on-the-job training - 'being shown how to do things and then practising them'.

5. Make an explicit connection between individual learning and personal advancement. This means being transparent about the learning opportunities available but also about the circumstances that surround this offering. Who is eligible? What sort of support will the organisation offer? New technology allows such information to be available to each employee through a 'learning portal' on their pc, and continuously updated.

6. Use a richer palette of methods to encourage learning. There is already much talk of coaching, action learning and e-learning. The term 'blended learning' is now being used, often to reposition or re-sell e-learning, given its early teething troubles. We must ensure that blended learning is not another top-down model of delivering training. We need to consider how we can use technology to improve the offering to the learner by mixing the blend and varying the channels. So far we have heard too little about the learner and tailoring the offering to his or her needs.

7. Develop a coaching capacity throughout the organisation. Coaching is about developing a person's skills and knowledge so that their job performance improves, hopefully leading to the achievement of organisational objectives. It targets high performance and improvement at work. Line managers are most likely to deliver coaching, and need not just the skills to do this, but also the commitment to carry out this role and the time to undertake it.
8. Articulate and share a strategy for learning. A move in focus from training to learning demands the active involvement of management at all levels. It is not something that the training and learning function can ‘do’ to the organisation, or make the organisation do. Communicating the strategy is therefore essential - as is working with senior management to ensure the strategy has meaning in business terms, gains support, and is implemented in the organisation.

The changing nature of competition means that the time is propitious for such a change in approach to employee development. For HRD professionals throughout the world, there is an exciting window of opportunity.

2.7 Stuart Winby: Organisational learning

The concept and practice of organisational learning has always been difficult for managers to measure and link to tangible outcomes. However, the tide seems to be changing.

Investors are beginning to recognise intangible value in organisations with a learning reputation because these organisations are able to

• create new ideas
• share those ideas throughout the organisation
• build knowledge networks where technology and communities of practice transfer experience from one setting to another
• turn those ideas into tangible value.

These companies seem to be able to increase their competitive lead as their intangible value increases.

A recent example is what Proctor & Gamble has done in driving growth through innovation. P&G has coined the phrase "knowledge is the only resource on the planet that doesn’t diminish when you use it". P&G has always been an organisation that learns.

What’s new is how rapidly they are putting what they learn to work - and in how many ways. Giving every business unit the benefit of what any business learns is helping P&G reduce the cost of innovation and accelerate time to market.

As CEO Lafley says, "Speed is just fast-cycle learning." The organisational mechanisms that enable fast-cycle learning are community of practice networks.

A similar example is the experience Hewlett-Packard (HP) had in the 1990s with its Work Innovation Network (WIN). The WIN communities of practice model fostered business driven work innovations and then spread these innovations across the company.

The community of practice was specifically designed to diffuse innovation. Concepts like peer consulting, neighbourhoods of learning, second generation prototypes or rapid prototyping forums, were all designed to 'spread and embed' new innovations.

This effort resulted in new work systems in manufacturing, R&D, and marketing resulting in significant performance improvements for the company.

What is interesting in both these examples is organisational learning strategies were not programmes to increase organisational learning for the sake of improving organisational learning - they were deliberately focused initiatives to improve the execution of company strategy.

Proctor & Gamble Case Example

In P&G, organisational learning strategies have been the engine to drive innovation. P&G has over several years embarked on a crusade to create new knowledge through discovery, invention, experimentation, and innovation.

This learning is then shared through dozens of communities of practice networks the company has fostered. These networks diffuse new ideas and innovation across business and geographical boundaries.

This has resulted in new products, new process innovations, and even new business model innovations. In this case organisational learning has added value to P&G stakeholders - investors, customers, and employees.
• For P&G the objective is to increase growth through innovation.

• For HP it was to increase time-to-market performance, then reduce manufacturing costs and improve quality, and then marketing new business creation.

The point here is the organisational learning strategy identifies the intangible assets that are most important to strategy execution. Where organisations attempt to develop their people, technology, and culture, most do not align these intangible assets with their strategies.

The key is to move from global learning statements like ‘develop our people’ to a focus on specific capabilities required by the critical internal processes of the strategy.

A strategy has a specific set of core processes required for execution and to deliver on the value promised to its customers. Those individual and organisational capabilities that enable, support, and eventually differentiate core processes are the firm’s most important intangible assets. It is these assets that link eventually to shareholder value.

The job of the HR executive is to identify the right capabilities that need to be built to improve strategy execution and eventually improve shareholder value.

Building organisational capability is in part a design process but also involves establishing a learning system. The task then is to develop key capabilities that enable the execution of strategy - and design a learning system specific to the capability one is building.

If innovation is the capability then learning strategy may be experimentation, in order to discover the innovation best suited for the marketplace first, seek feedback and adjust. Designing these types of work systems is at the heart of where HR provides value to the enterprise.
3 Perspectives from Learning Leaders in Organisations

The case studies in this section are personal perspectives from the person named in each case - usually the head of the learning function. Each piece is, in effect, the summary of a dialogue. Wherever possible, the written version retains as much of the individual ‘voice’ of the participant and has been refined by them. The cases are in alphabetical order to make them easier to locate.

3.1 Associated British Foods

ABF is a diverse international group, which includes familiar brands such as Primark, Twinings, Blue Dragon, Ryvita, Silver Spoon and Kingsmill. The group is headquartered in the UK with about 40,000 employees globally. Responsibility for learning at the corporate centre is focused on executive development, talent management and the executive succession pipeline. Learning policy and practice for the majority of the workforce is devolved to the operating businesses.

Integrating executive development

There is an explicit Group approach and set of processes that integrate succession, talent reviews and leadership development. The approach is relatively new and has been developed in conjunction with the divisional CEOs, HR directors and learning professionals in the business. With a very small corporate centre of about 40 people, a close partnership between Group executive development and the directors of the divisions is essential.

We find that continual dialogue with the divisional HR Directors and CEOs is central to aligning leadership development offerings with business needs.

This dialogue also enables the organisation to continually refine and build on current initiatives, which is important to ensure the proposition remains fresh and relevant to ABF’s strategic business challenges.

In concrete terms the corporate executive development function covers the top 200 jobs in ABF, with a review of around 500 people across three talent groups.

1. Divisional Leadership Teams - the divisional CEOs and Boards.
2. Experienced High Potential Managers with more than 15 years experience, at any level.
3. Early Career High Potential Managers with between 5-15 years experience and at any level. The process also identifies ‘emerging talent’ - people in their first five years.

Our strategy for executive development consists of both principles and processes.

• The People Review is a twice-yearly organisational succession and talent review fed from the business divisions. It involves the Group CEO and divisional CEOs and HR Directors. The overall Review is a corporate process, defining the talent pool populations, and identifying specific developmental actions for individuals and teams as appropriate.

• Development for people in the talent pools is appropriate to their career stage and experience rather than age. Individuals agree development plans with their line manager in their operating business, and any corporate development is incorporated into this.

• There is an emphasis in development on getting people the experiences they need. In the case of those with high potential, relevant career moves across the business divisions or internationally are encouraged.

• Networking and shared learning between those in the talent pools is taken into account in designing and delivering learning interventions for those within the three populations above.

Working within the corporate culture

To be successful in our organisation, leadership development must work within the devolved structure of the business and operating style. The prevailing culture leans towards an activist and pragmatist approach. This has the advantage that the organisation is keen to make things happen and there is lots of energy. However, the downside is limited focus on
reflection, which can reduce self-awareness and the ability to consider key learning from situations and experiences.

We therefore seek to build a reflective stance into our leadership development offerings, while making use of active modes of learning such as projects and case studies.

The strategic challenges faced by the businesses are also incorporated into specific programmes. For example, each year we run a six month Leadership Development Programme involving our Early Career High Potentials from across the organisation. This includes

- 360-degree feedback
- five bespoke modules delivered by external experts
- project work in groups of three or four which includes peer coaching and visibility in different businesses across the Group
- a report-back to the Group Chief Executive and senior leaders.

Each project team, which is effectively a learning set, has a divisional CEO as its sponsor.

A lean and integrated HR and learning function

At divisional level, learning and development is part of the HR function, which itself is relatively small in terms of staff numbers. Larger divisions have L&D specialists, but some cover L&D from a generalist HR function. This boundary is quite fluid and pragmatic.

An advantage of the lean HR structure is that it often generates closeness between HR and senior line managers. Certainly the interest and personal involvement of the Group CEO has a significant impact on the profile of learning in the organisation.

We are using a range of metrics to assess the effectiveness of Group executive development activities such as:

- succession coverage
- proportions of staff seen as having high potential
- cross-divisional job moves
- promotions from the high potential pool, etc.

It is anticipated that further metrics will be developed over time. There is also a database for those in the populations of corporate interest to continually track progress and enable reporting on succession and development activity.

Collaboration is the key

Working in a highly developed organisation with a small HR community allows a huge degree of flexibility - but also requires pragmatism and the creative use of resources.

The operating style of ABF enables corporate learning and development to be a support to the businesses, not an imposition. This is of great advantage when building relationships.

As the business is performing very well, it is unlikely that there will be a fundamental change to the approach in the short to medium term. However, as there is more dialogue between business divisions, collaboration is increasingly in evidence where there are benefits in shared activity. One example is with functions such as marketing, HR and finance, which run across business divisions. Their divisional directors meet quarterly to facilitate discussion on shared agendas, of which people development activity is always the key agenda item.

3.2 BBC

Learning key to business and staff

Learning lies very close to the heart of the BBC. We need to learn rapidly in a sector where both market
pressures and the use of technology are driving change. The BBC also has an explicit remit, under the licence fee, to train for the sector as well as itself. The BBC has a huge business challenge to refresh itself over the next few years. If we fail to change quickly enough, it will become an irrelevant organisation.

**Working for the BBC gives people a ‘right to learn’**

Learning is central to achieving the required pace of change. The learning strategy therefore is about building capability for the future BBC in the context of rapid change, both technological and social. There does need to be a very strong line of sight between learning and development activity and business objectives.

Access to learning is also a key component of the employment relationship in the BBC, and a significant reason why people work here. They feel that working for the BBC gives them a ‘right to learn’ - and that any pulling back from a strong ethos of learning would somehow break faith with their psychological contract.

Senior managers may sometimes underestimate the depth of feeling which BBC employees have about getting strong support for learning.

**Business leaders taking learning decisions**

There are a number of structures and processes used to keep a strong line of sight between learning activity and business needs.

- **At grass roots level**, the use of computer-based systems to help employees analyse, record and update their development needs and identify development opportunities is an ‘in your face’ way of putting learning tools on your desk and making learning part of your everyday working life. Through this system and appraisal, staff are encouraged to see learning as intimately linked with their own job performance.

- **Formal structures** for engaging business leaders in taking responsibility for learning and collectively setting priorities include a corporate Learning Board, chaired by the Deputy Director General, and Centres of Excellence in key functions or skill areas such as leadership, production, journalism and creativity.

- **The visible involvement** of such senior people in key decisions on learning and development gives the L&D function much more credibility and clout with other managers.

- **Staff surveys** are used to track behavioural changes, and feedback on programmes is also used to influence future training activity. We do need to show that public money has been well spent.

When major issues affect the BBC, there can be a direct response in training terms. For example, in the wake of Hutton, a programme was rolled out to strengthen editorial policy and elements of good practice in reporting. Some of the learning was in the form of on-line modules and there was also a half-day face-to-face session of a very practical nature, based on simulated situations. The programme involved teams training together, to reinforce their collective as well as individual learning.

**Learning as collective, not just individual**

The notion of ‘organisational learning’ is quite strong in the BBC, and consists of the strands of ideas and activity shown here which move beyond ‘training’ individuals.

- Creating and reinforcing the right ethos and values in the organisation, explaining how it operates, helping staff understand how they are expected to behave, and how to apply their knowledge.

- Induction training has been strengthened to put the ethos and values in right from the beginning.

- Encouraging people to share their knowledge freely with each other. We are very vulnerable as a business if we do not do this, especially in times of pressure and change.

- Creating a unified approach to learning issues and a shared philosophy of learning delivery.

Electronic communication is now central to how the BBC does its work and is therefore a natural way of sharing information and expertise. There are 7-8,000 regular users of discussion groups and forums on the internal Talk gateway. This way of sharing knowledge works especially well for technical groups. The technology also links people with shared skills and interests - called ‘cognate groups’ - rather than assuming people
in the same function or part of the business will define learning communities.

‘Blogging’ has taken off in the BBC and appeals to groups like journalists, who challenge the orthodox structures of the organisation and share more personal perspectives.

Visibility of some very senior managers as ‘bloggers’ has had a big impact on attitudes to sharing knowledge in a more open way.

Web-based support is also available to managers, linking them with people, events and resources to help them solve particular problems.

Action learning sets for managers, facilitated by training and development, are part of leadership programmes - again encouraging a more collective approach to learning. There are currently about 1,000 people working in action learning sets of 5 or 6, supporting each other in this way.

Inviting people into learning

In terms of a philosophy of how learning should be delivered, interventions are:

- fast to respond to a need being identified
- delivered in small bites
- flexible in delivery method, be this face-to-face, online, coaching, etc.

People are better motivated to learn when they are not afraid or worried, so we try not to be dictatorial in response to mistakes. We do this by offering workshops which are not about blame for past mistakes, but about how to deal with difficulties.

We have found that ‘inviting’ people to participate in learning activities gets us better take-up than ‘sending’ people.

We want to position learning as non-remedial and positive, not as a way of punishing or bullying people. Coercion does not work well in such a non-compliant culture as the BBC.

A more fluid training and development function

We need a very flexible training and development function to be able to deliver so quickly across a wide range of skill and knowledge needs. Very little activity is pre-packaged - most is negotiated and then designed to meet the particular learning objectives required.

Movement in and out of the function puts it even closer to the business.

We have found that some training specialists transfer readily to this more flexible way of designing and delivering interventions, but some do not. Quite a lot of our trainers come from other parts of the BBC, bringing specific skills with them. We also aim to bring people into the function for limited periods of time, within other careers, as part of their development and to share knowledge and skills. This is especially useful with technical experts and also with senior managers. Both these groups add great credibility to training activities.

They also take a stronger learning ethos back with them into their home functions. Movement in and out of the function puts it even closer to the business. The job of leaders is then to make sure learning is managed properly and keeps its place at the top table.

3.3 easyJet

easyJet is still a young business, with a clear business strategy and an ambitious growth plan. It has about 3,500 staff. Along with growth, the business is moving towards a more decentralised way of operating, which will change the demands on managers and leaders. easyJet is also becoming pan-European, so its UK-based culture may need to adjust. There is a strong focus on containing costs in such a competitive market.
Clarifying the learning issues

For the learning function and activities to support business growth, our goals and priorities will have to be closely aligned with business priorities and be very cost effective.

Thinking about learning and development strategically is quite a new experience for us.

We have only had management development activity for the last couple of years in response to realising that we are now a larger organisation and need new processes to manage ourselves.

We have recently developed an explicit learning and development vision and strategy. This document is being used as a communication tool and as a way to further shape our approach with senior people in the business. This strategy is not yet explicitly communicated to all our staff, as we are still at an early stage in implementation.

In developing the L&D strategy, we conducted internal research with over 40 senior managers, varied workforce groups and our colleagues in HR and learning. This process has highlighted some of our key learning challenges.

- Leadership and management development to set direction, run the business and motivate staff in a more devolved organisation, and a more culturally diverse context.
- Talent management and succession to reduce a 'talent gap' already perceived and to make sure good people are retained by the business as it grows.
- Stronger customer service mindset and wider business awareness among the larger and more decentralised management population.
- Ensuring that all learning and development, from induction onwards, reinforces consistent messages about the strategy and values of the organisation - and making sure these are embedded in basic processes such as the way meetings are run, the way performance is managed, etc.

Setting clear priorities for action

The resulting vision for learning and development has a strong emphasis on organisational capability, delivering business strategy and developing potential.

The strategy, sitting within the vision, is a more comprehensive and practical agenda of learning and development priority action areas over a two to three year timeframe. Four of the short-term priorities are to

- develop a leadership framework and programme, including coaching and mentoring to support individual needs
- develop and implement a talent management framework and succession process
- launch the Academy to pull together learning activities and make learning a stronger part of the employer brand and workplace culture - see the box
- further develop the L&D function to support the values - through induction, for example, and support specific business changes through working with teams in the business on their issues.

We are aware of the need to grow the culture at easyJet which is relatively non-hierarchical, quite creative, and has a family feel of people 'mucking in'. Training needs to feel quite creative and mostly experiential. We need to keep learning close to the job and develop our coaching capability. We will encourage accreditation of learning where appropriate to encourage, recognise and reward learners.

The easyJet Academy

The Academy will be a physical location, but will also offer e-learning solutions. As an increasingly pan-European business and leader in e-business, e-learning is a natural step to take. We are, however, very people focused and we will invent a unique blended approach.

We are trying to develop the concept of using the 'right method for the right training for the right person'. We, therefore, plan to experiment with new methods of learning and blended learning solutions. The Academy will touch all our people in some way - it will emphasise meeting the skill and career development needs of individuals as well as the business.

The Academy will be a visible umbrella organisation for all learning activity, both technical and generic.
The delivery of this strategy will mostly be measured in terms of whether it delivers its stated objectives - are we doing what we said we would do, and within our planned budget?

We also need to develop better measures in terms of business impact and the performance culture of the organisation.

Growing a future L&D function

At present we have a very small central L&D team, recently expanded from three people to a future number of six! In addition there are at least 100 technical and job specific trainers out in the business.

Technical training is highly regulated, mostly by the CAA. Several of the major workforce groups, such as cabin crews, have their own training teams drawn from the line. Their reporting lines are quite often defined by regulatory arrangements.

We do not plan to have a much larger in-house L&D function, preferring to outsource or train via our own line managers. We don’t want to look as though we are empire building. We already have some close relationships with external training providers, and will develop others to bring in the required expertise.

The L&D staff we have internally need to be very commercial and good at influencing and building relationships. They need to very self-managing and good at getting things done.

The rather ‘namby pamby’ image development has in some places is definitely not for us.

There is obviously a two way relationship between our need to develop better leaders at all levels, and the ability of the line to lead on supporting learning and coaching staff.

Working in an emergent business, we need a continuously adapting L&D function to match. We are already finding that people want learning and development to be stronger in the business and our strategy seems to make sense to people in business terms. We are fortunate in having very strong backing from the Board, who really want good people in the business.

Keeping a strong business link will be central to taking people with us as we develop learning more. This link is helped by weekly meetings with members of the senior management team and by having a People Director on the Board. In time we hope to make easyJet a ‘learning organisation’ where learning is a natural part of the way we do things.

3.4 Ernst & Young UK

The learning and organisational development function in the UK covers the UK, but also countries coming under the UK area, so it has an international dimension too.

Learning priorities need to be strongly driven by the business

There is an explicit vision for learning and organisational development, based on three key purposes.

- Ensure provision of individual and organisational learning such that the careers of our people are enhanced and the potential of individuals and the firm is maximised.
- Establish and embed best practice so as to promote efficiencies and effectiveness in the way our people learn and develop.
- Develop and execute a learning and development strategy which drives cultural change and embeds our shared values and characteristics in order to attract and retain the best talent in the market.

The vision outlines how these purposes are to be achieved, for example through links with the employer brand, performance management and coaching, both formal and informal learning, developing the leadership ethos, and so on.
Learning is quite broadly positioned in business terms, and acknowledges both individual and business benefits. The vision is really our aspiration for learning in the business.

Below the vision, strategic priorities are identified for the function. These are practical action areas used to prioritise the work of the function in any given year. They need to reflect the priorities the business is addressing over the same time period, and are based on discussions with the Executive Board and business unit leaders.

Having clear line sponsorship creates a strong link between HR and the business.

The emphasis here is on the capabilities the business needs to attract and retain staff, to deliver its services and to differentiate itself in the marketplace. Current learning priorities include:

- supporting specific business challenges around deepening our relationship management capability at all levels
- building a high performance culture with particular emphasis on leadership and coaching
- strengthening some aspects of the employment proposition at key career transition points.

As head of the function, I report to our People Partner, a member of the Executive responsible for people and HR. This person, as a senior business partner, is not an HR specialist. Having such clear sponsorship in the line creates a strong link between HR and the business. It certainly helps the learning function develop a clear line of sight between our priorities and business needs, and sends an important signal to the HR community that it is aligned and focused on supporting the business.

Building learning into work

Technical learning will always dominate in this business. It is driven by the line and is often mandatory in order to meet regulatory requirements. Rather than having to offer ‘non-technical’ training separately, we would prefer to integrate it into the way technical learning is experienced. That way we could reduce the tendency to view generic skills as ‘soft’, and also help our employees to integrate their learning better.

In this way they would be better able to develop their leadership, people and communication skills alongside their technical skills.

If we are seeking to engender a culture of work-based learning then we have to design learning into our work processes.

So, for example, project reviews are an ideal opportunity to build in individual and team performance reviews within a mainstream work context.

We want managers to take accountability for coaching and supporting the learning of others, but we are still some way off measuring them on this and rewarding this aspect of their performance. We do need to recognise that putting time and effort into learning may impact business output in the short-term - and the business needs to come to terms with this to achieve longer-term gains.

Leadership development - beyond the sheep dip

We have had real gaps around management and leadership development and have been seeking to plug these. Some of this has felt quite remedial. We are now trying to move towards more pro-active leadership interventions, as this example shows.

We are putting in programmes to support individuals through some of their key career transitions. These will help them be aware of, and better able to meet, the major changes they will inevitably experience and the need to think differently about the business, their role and contribution at different levels.

These programmes are run internally with significant coaching and mentoring support.

We are also engaging our senior leaders in delivering learning. For example, we use
partners as mentors. This demonstrates the importance of learning, both to those on the receiving end and to the partners giving their time to support their people. We know from our staff surveys that this is very important - and that partners especially need to role model these behaviours more effectively and more consistently.

Our surveys ask staff both about the quality of support they receive for their learning - whether their managers and the culture is sufficiently supportive - and the range of development opportunities on offer, especially the stretch they get in work-based experiences.

You need to find some way of helping very senior people to connect with the learning of others.

For some of our partners, that connection lies in the idea of the 'legacy' they leave behind in the business from their time as a partner - the idea of the business being stronger after they have retired than it was when they became a partner.

Internal structure of the learning function

The structure of the learning and development function reflects different types of learning and is based around five teams and their programmes of work.

- Leadership development
- Performance management
- Organisational development
- Learning operations
- Partner development

The OD team supports specific business changes and business learning - programmes to directly support our 'Go to Market' strategy, for example. The work of the function is seen as developing and delivering strategy in each of these areas, but also working in partnership with business units and using external benchmarking.

There are just over 20 people in the national function for the 7,500 employees in the UK. Formal training programmes are often resourced externally. Technical training is managed in-house, covered by additional small teams of three or four people in each of the service lines and the use of secondees from within the business. We have managed to staff our function well and may be looking to strengthen it further on the OD side to support business change more thoroughly.

The skills people need in OD are in implementing change, building relationships, influencing and strategic/conceptual skills.

We need to invest in our own development in the learning function to achieve our goals, and perhaps we have been a bit shy of doing this in the past.

The challenge of organisational change

The big challenge really is to effect organisational change. Formal learning is not enough to achieve this - you need other types of learning and changes to core business processes and work systems. There are a number of levers that need to be pulled.

- Senior sponsors to champion the change.
- Agents of change at a business unit level equipped to lead and implement the change at a local level.
- Alignment with performance management and measurement systems, which are more powerful if linked to reward - only measure that which you wish to change.
- Communication is crucial to keep the change front of mind. There is a danger of initiative overload if you run with too many things at once - and if you are not clear about what you are going to stop doing.
- Recruitment criteria need to reflect the kinds of people you are looking for, and induction is important in setting their expectations and supporting their integration during the first six months. Historically, we have not paid sufficient attention to this area.

Key to our future success will be keeping in closer contact with our business leaders.

Without this we cannot have the depth of relationships and build the level of trust we need to implement more innovative and pro-active approaches to learning. This will also be crucial
in managing the inherent tension between business unit versus enterprise-wide solutions.

3.5 John Lewis Partnership

John Lewis Partnership covers both the John Lewis department stores and Waitrose and employs around 62,000 people. The two parts of the group run fairly separately and this raises interesting strategic business issues about whether there is scope for more learning and synergy between the business divisions.

There are two aspects to the corporate learning role.

• Responsibility for developing the top 150 people across the business.
• Setting the strategic direction for learning for the group as a whole.

Most of the people directly involved in training and development lie within the business divisions and are fairly autonomous in what they do.

Commercial challenges and the essence of ‘partnership’

There are some significant challenges in moving the business forward. John Lewis has recruited able people in the past, but there is a lack of commercial knowledge and orientation in many workforce groups. This is a result of being rather inward-looking over the 75 year history of the Partnership, and feeling that we had little to learn from other organisations. We also need broader management skills to achieve high performance in such a competitive sector.

By contrast, we have been good at technical training lower down in the organisation and have a strong business discipline in our operations.

Issues of management and leadership are interesting in an organisation with a most unusual history. See the box.

Over time, the involvement of employees with the business has become more symbolic, with rather limited real involvement in key business decisions. A recent employee survey showed that only a third of ‘partners’ felt that the democratic model was effective and this has prompted top level debate about the values of the business and how they are manifest.

Exploration of these issues with groups of staff has shown rather weak awareness of the Partnership model and little evidence that staff are aware of it when they join the business. However, staff gain satisfaction from their relationships with both customers and colleagues, and do feel a strong feeling of community at work.

Some of the unusual ways the business still helps its staff with more personal problems are really appreciated by those who come across these benefits.

There is an opportunity here to position learning more powerfully within the employment relationship.

Some priorities for learning

These business and cultural issues are setting some key agenda items for the learning function.

• We are strengthening commercial knowledge and strategic business awareness in the management population and in key functional groups - buying, for example. This is fundamental business education in which we have been lacking. We are working with external providers here, such as INSEAD and HEC Paris. Interestingly, the feedback from these providers is that our people are very committed to the business and keen to learn, compared with delegates they see from other businesses.

Partnership Model

The Partnership model potentially gives John Lewis a different relationship with its employees. The original intention, which continues, was to share wealth with employees, to share power, and to make employment more enjoyable.

The Partnership’s ultimate purpose is ‘the happiness of its employees in meaningful employment’.
To bring life back into the potentially unique ethos of the organisation we need to be more open with staff, to really share knowledge with them and to trust them with information. This calls for a change in management behaviour.

Our small central team is now working to establish a corporate Academy. This is not a building, but an holistic process embracing effective succession and continuity planning, talent management and a comprehensive set of learning and development activities.

Initially, the Academy will be directed at senior management, but we hope to work with the divisions to extend this collaboration to a wider management population. We hope by so doing to spread knowledge and best practice more widely within the business.

3.6 Ministry of Defence, dblearning

Differentiated learning providers, missions and strategic plans

In meeting the diverse needs of civilian as well as military personnel, the MOD has a number of training delivery organisations with different ‘missions’. The term ‘mission’ has a more tangible meaning in military circles than in business - as a practical description of what you are setting out to do.

This segmentation of the learning function in such a large organisation encourages different types of learning and development capability to focus on different types of needs. The varied learning providers, including dblearning, are being brought closer together under the umbrella of the Defence Academy.

The stated mission of dblearning is "to provide opportunities to help people in defence learn more quickly what they need to perform business tasks effectively, both immediately and in the future."

dblearning is mostly, but not exclusively, a civilian training organisation, concentrating on junior and middle management training, and technical training in key business support functions, such as finance and IT.

Compared to other MOD learning providers, it offers shorter and more flexible training interventions, and needs to be very responsive to the civil service policy agenda and MOD business needs.

The strategy of dblearning is made explicit in a four year strategic business plan, which is shaped within the wider MOD planning process. This identifies priority action areas and also internal standards - in evaluation, handling complaints, and the productivity of trainers, for example. Achievement against these priorities and within resources is how the performance of dblearning is measured.

The personal performance of senior staff in dblearning is also measured in relation to delivering the business plan.

Priorities are translated into plans for specific learning activities with defined objectives, methods, and target audiences. There are a range of quantified targets - for example, numbers of training days to be provided, customer satisfaction scores, time taken to develop new programmes, etc.

Taking multiple soundings on business needs

In framing priorities for learning, it is wise to use multiple sources of intelligence. My personal view is that the task of acquiring and balancing these perspectives - and taking an independent view - is a key part of my own role. These sources include the following.

- Customer satisfaction scores from actual training and development delivery.
- Some of the most senior people in the organisation are major customers and ‘sponsors’ for dblearning. You need to talk with them both formally and informally. There is a formal senior committee which reviews learning priorities and delivery. It is also important for the head of a learning function to develop personal relationships with key business leaders. This is more difficult for staff at more junior levels in the function, as they simply have less access to the most senior managers.
- Some of the priorities of business leaders relate to major business issues or changes, but some are
more general perceptions of skill gaps in the workforce - a lack of clear policy-writing, for example. The 'powerful aside' can be as important to framing priorities as the formal planning process.

- We also need to engage with managers and staff at all levels to pick up on their needs. This can be partly achieved through a business partner model. We have customer account managers who link with the business divisions.

As an intelligent supplier, we have to challenge as well as support what managers and staff say about learning needs. It is important to keep an eye on the timing of learning interventions - in the long run up of the Freedom of Information Act, for example. It helps in taking a balanced and forward-looking view to keep in touch with what people are doing in other organisations. That way you match the best and do not miss something that is becoming known in the environment around you.

**The aim of aligning learning with business need should be to anticipate demand. You also need to be able to read the minds of your customers, not just hear what they say.**

**Translating the strategy into practical interventions**

The Armed Forces use particularly rigorous training processes, based on thorough needs analysis, design and evaluation. Their periods of training are often intensive and lengthy, interspersed as they are with periods of active service. Because dblearning tends to be more a provider of shorter 'instant' training interventions rather than longer 'cask-matured' programmes, we have adapted these processes quite pragmatically to be able to design and deliver smaller scale interventions more quickly.

There is, however, still a strong emphasis on showing effectiveness and value for money. Feedback is used to refine training products, and selected programmes are periodically evaluated more rigorously.

Dblearning is trying to move the organisation away from seeing learning just in terms of knowledge based formal training which is 'done to you'. The intended philosophy can be described as 'guided self-development', with the line manager helping the employee to structure their learning. Some training is mandatory - in health and safety, and diversity, for example.

**It is still difficult to get MOD employees to understand that they need to be proactive in their own development.**

We chose the name 'dblearning' deliberately to get away from the assumption that all learning happens through training courses.

We now offer many types of learning including e-learning, experiential learning such as work shadowing, and providing opportunities for networking. Some of our senior trainers are customer account managers who work with business divisions to provide them with bespoke learning solutions. MOD also has an internal consultancy unit which covers some of what one might call OD support.

**Shifting attitudes to learning**

In contributing to wider organisational learning, we are seeking to instil a culture of learning in all staff. This requires managers who are conscious of learning, so there is now a heavy emphasis on coaching within management training. We would also like to do more in linking learning with capturing and accessing knowledge, but building large databases of documents does not seem to achieve this.

**Our role includes helping people to network more with each other, as a means of sharing knowledge and understanding. Training programmes are important in helping individuals form new networking links in such a large organisation.**

MOD has library specialists, and in future it would be good to work more closely with them on how we can help our staff to access information more readily.

**Ensuring people can access the learning they need**

It is important to reality check the resources you need to deliver a learning strategy. Ensuring your offerings can reach their potential audience in the workforce is also crucial.
Many strategies fail not in the products, but in the communication, marketing or simple issues of access. For example:

- can staff get the funds to travel, and do they have access to the IT they need to use your products?
- might they just not notice you have something to offer them because the volume of other communications swamps your message?

Learning strategies are also vulnerable to people believing they don’t have the time to learn, or fear that they will not be allowed to. So the best learning strategies offer constant promises of time saved and permission given.

A challenging future

Changing the way learning is supported will have a major impact on the training and development function. We need to provide expert level training in key business functions as well as awareness training for non-specialists.

We will need to involve more experts from functions such as finance and IT in delivery. As e-learning becomes more sophisticated we also need new skills, for example in e-moderation of virtual learning sets.

It is the living, breathing relationship with key players which matters.

There is always a danger of the training and development function being tolerated - but only tolerated - and then being the sacrificial victim when times are hard. We need to meet real business needs, and have the evidence, stories and anecdotes to demonstrate this, and know how to listen to the organisation.

Formal plans and service level agreements can set a basic framework, but beyond that it is the living, breathing relationship with key players which matters.

3.7 National Grid Transco UK

Creating a new approach post merger

National Grid Transco UK covers the main regulated businesses: transmission, distribution and business services. These were brought together through a merger of the gas and electricity transmission and distribution businesses. NGT plc corporate centre covers leadership development for the most senior levels (top 60-70) - with our input - and NGT UK covers all other aspects of learning and development for its business.

NGT uses the term ‘policy’ for the explicit high level statement about learning principles, responsibilities and key processes.

This policy emphasises that learning and development is for everybody and that employees need to take ownership of their own development, supported by development reviews with their manager.

The term ‘strategy’ is used for the more concrete bridge between policy and implementation. The Executive of NGT UK has been involved in framing learning and development strategy at a time of significant business change. In recognition of limited resources and big business challenges, we have taken an investment approach to learning, asking where training investment will have the greatest business impact.

We are concentrating on leadership capability at all levels and especially the need to enhance the quality of first line management. We are looking for a more coaching and facilitative style of management. This priority is endorsed partly from employee survey feedback on the quality of management.

When you are merging and changing structures and jobs, it is difficult to keep enough of a future orientation in learning and development.

Prior to the merger, National Grid and Transco had rather different approaches to resourcing their training and development functions. National Grid outsourced much of its management training, and Transco outsourced much of its technical training.
Some practical steps

Since the merger we have been evolving our approach to learning delivery. Third party providers in respect of core technical training on the electricity side are limited currently, and our own training centre at Eakring has unique facilities. Our current strategy is to fully maximise the return on investment here, extend where practical to gas related technologies, and run it on more commercial lines with greater focus on external benchmarking of costs etc. Technical training budgets are currently managed centrally.

Some of the practical steps we have been taking to improve learning include the following.

- **A stronger development review process** as part of performance management. Some managers choose to do these as separate discussions (one looking back at performance and the other looking forward to development needs) although the overall process termed Delivering Performance is a single linked one. We have found there are real variations in need according to the situation of the employee and the relationship with their manager. A Personal Development Plan (PDP) will be an output of the review process.

- **A framework of behaviours** linked to the plc values for all staff is also linked into the performance management system - in addition, we have identified leadership attributes expected of all levels of leaders.

- **Stemming from the belief that true learning is linked to experience and application, we aim for a 70-20-10 approach to learning:** 70% of learning is through on-the-job experience; 20% through coaching, including from the manager; and 10% off-the-job training interventions eg reading, mentoring, job shadowing, e-learning, training programmes, etc. We expect to see this refected in PDPs and encourage individuals to move away from a training course as the only solution.

- **In the leadership area, we are investing in four skill areas**, where we believe improvement will make the biggest impact: coaching for high performance; systematic performance management; emotional intelligence; and conversations which make a difference. Modules in these areas are being delivered to managers and learning guides, with practical tips, are available on the intranet.

- **Clear assessment** of the needs for technical training using our technical competence frameworks. Technical training accounts for about 70% of our training activity, not surprising given the nature of our business and legislative environment. It supports our ‘road to zero’ policy on accidents. Through the frameworks in place, the line assesses technical needs.

- In consultation with the learning and development function overall company needs are established. Learning and development act as informed buyer, sourcing needs internally and externally as appropriate.

In terms of knowing whether we are succeeding, we feel it is best to have a number of indicators going in the right direction - as shown in the box. Technical training is essential to our operating, so it would be inconceivable to loosen our grip on that.

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<tr>
<th>Performance Indicators</th>
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<td>- Take up of training opportunities</td>
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<td>- Costs</td>
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<td>- Benchmarking comparisons - Saratoga, etc.</td>
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<td>- Graduate trainee retention</td>
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<td>- Leadership behaviours 12 months after programme</td>
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<td>- Employee attitude survey</td>
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<td>- Ongoing review of new performance management system through telephone surveys of one in ten employees</td>
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Working with HR business partners

The L&D function is an integral part of the HR department. The operating model is for HR Business Partners to provide a complete service to the line in terms of human resourcing needs calling on specialists, such as L&D, as required. The role for L&D has shifted to the more value adding activities and, since merger, numbers have reduced.

HR has rather more business partners on the ground and we work very closely with them to pick up where the business needs training specialists to help them.

Going forward, the function may need different skill areas such as commercial skill development. **We also need to help our HR business partner**
*colleagues take on a stronger remit for identifying learning and development issues - for some this was not previously part of their role.*

With such a strong focus on change and with the pressure to do more with less resource, we need to keep learning and development high on the agenda and future looking - not just meeting today’s obvious needs.

The employee survey tells us there is still a long way to go with leadership development, especially role modelling the desired culture at senior levels. I would like managers to have specific targets on staff development.

### 3.8 Prudential UK

Prudential UK is part of the wider Prudential Group and spans some 7,000 staff in the UK and an associated processing and enquiry centre employing about 900 staff in India.

In the Prudential, the learning strategy is not a separate, explicit statement, but sits within the overall People Plan for the organisation. The particular mission of the learning and development function within the wider HR remit is to ‘build people capability.’

*Generic skill development linked to capability model*

A unified capability framework has been developed, focusing on seven key capabilities defined at four levels. Each level is defined in terms of ‘scope of responsibility’ in that capability, with a matching definition of ‘observable behaviours’. These are used for

- defining job roles
- job evaluation
- performance management, which is linked to bonus pay
- people development

This approach to capability has been built into a newly-launched on-line learner management system, called *Learning Space*. This links the employee to 1,000 learning opportunities mapped to the capability framework, 2500 other resources and a library of 40,000 business books. It also keeps a record of learning undertaken and provides management information on learning activity.

The system can implement ‘gates’ on certain materials and events where they are targeted at a specific workforce group. For example, there is a corporate university covering the more senior people and offering several events each year for them.

*A blended learning approach is used, combining a series of programmes by capability and level with e-learning (about 30% of learning undertaken), books and resources, and other experiences.*

Enhancing coactive coaching skills is a particularly crucial area of ‘soft skills’ training at present with a practical two and a half day programme. Prudential University for managers, combines a programme at Warwick University with pre-reading and project work.

*Technical training in a highly regulated sector*

One of the seven capabilities is called ‘Knowing the important things’. This covers technical and functional knowledge, including products and services and industry standards. Technical training is largely led by the functions, and supported by a relatively small team in the central L&D function.

The same learning gateway covers technical learning, and the system will hold vital
information on who is trained in what and when.

Before this system, people didn't always know where to go to find out about learning. Now there should be just one place to go.

The learning philosophy expects managers to be active in the development of their people. The performance management system covers both performance and development explicitly.

There has been much debate about the possible tension between formal performance reviews linked to pay, and development. In our culture, the link with pay does make the performance and development review more significant. An individual development plan is produced, which the manager has access to and can monitor.

Shifting the learning culture

We do not see the organisation at present as a 'learning organisation'. The large amount of compulsory training which employees at all levels have to undertake to satisfy regulatory requirements, can cause assessed technical training to eclipse our desire to strengthen the wider capabilities of the organisation and to encourage employees to seek further development. Technical training is a significant majority of the learning activity.

Our people certainly get a lot of training, but less learning and development.

Technical training is often seen by employees as a 'necessary evil'. It is fascinating, by contrast, to see just how thirsty our people in India are for any learning - and they see the technical training very much more as positive development than the UK team do.

We are trying to shift the culture in a number of ways, by:

• supporting employees taking technical training with workshops and tutorials, so they feel we want them to succeed and are active partners for them in this

• seeking to change the attitude that learning is time taken away from the business and therefore detrimental to business performance. Our people find getting the time for learning a real barrier

• offering more bespoke learning interventions in response to business requests. This work now takes the lion's share of our internal L&D resource.

Learning and development as a ‘flexible bench’

The learning and development function has been pulled out of business units into a more centralised and flexible resource.

A Customer Relationship Manager and Development Consultants (one for each major business function) funnel business requests for bespoke learning activities to a ‘flexible bench’ of L&D people who can ‘build’ the right products and then get them delivered.

Three external partners are used to work alongside internal L&D people to deliver learning. They were chosen through competitive tender.

• One with expertise in core skills.

• One to furnish e-learning solutions.

• One with expertise in sales training.

These partnerships are very close and employees should not know who is from the internal function and who is from outside.

Business requests are prioritised with reference to the business plan and in dialogue with the HR business partners. Major business projects have training resource built into them, as part of the project management protocol. Distinct teams within L&D deal with these different types of work:

• planning and resourcing

• operational delivery

• supporting major projects

• regulatory training

• the development team.
So how do we assess our success in delivering learning which supports the business?

Both training needs analysis and back-end evaluation are core functions of the L&D team. We do try to examine the application of learning but getting to the measurement of return on investment is extremely difficult as so many other factors influence business performance.

For the projects we undertake, we have adopted a simple rating system. People in the learning delivery team and people who are its customers in the business rate each event as either unacceptable, bronze, silver or gold. Each category has detailed criteria which must be met to achieve each of the different levels.

This allows us a simple method of aggregating up customer response, effectiveness of learning and business benefit.

Keeping close to the business

We try to meet the challenge of aligning learning with the business by staying in close dialogue, as well as building learning into business plans. We have L&D roadshows four times a year with our own L&D team and our external training partners. Our priorities are as follows.

- Making sure the regulatory stuff is right - this is our licence to practice.
- Balancing the generic core offering with a flexible response to bespoke business needs.
- Ensuring we engage with the needs of the business.
- Building a superb relationship with our external learning partners.
- Shifting wider attitudes to learning and development.

Delivering appropriate learning is more important than writing long policy documents - you simply have to keep working in the right direction.

3.9 Vodafone UK

Learning for today and tomorrow

Vodafone UK covers about 10,000 staff and is responsible for their learning and capability development. The corporate centre is responsible for the development of directors - about the top 25 in the company. Global learning interventions are mostly leadership related.

There is an explicit learning strategy for the UK. Learning is related to the needs of both the organisation and of individuals. All staff need access to learning to be able to do their jobs. Thereafter, development is based on performance, with better performers being given access to more development.

A strong priority is to improve management capability.

The overall plan for learning delivery is linked to the business planning process, with functions prioritising their needs. At present there is a strong priority in the UK on improving management capability.

At an individual level, a clear distinction is made - for example in the performance and development review (PDR) process - between development for the current job role and future development to build capability outside the current role, and for the future. Managers are encouraged to discuss both of these. Individuals access development with the agreement of their line manager through the PDR process and a learning management system.

Functional ‘academies’ as gateways to learning, serving different sub cultures

Learning solutions are suggested on the learning management website. These cover both general competencies and ‘academies’ covering function-specific skills and knowledge. The system knows your job role and performance rating and takes this into account in the learning offered. Employees performing poorly are focused on learning for the current role.
Those performing above expectations are more likely to be offered educational sponsorship and programmes pitched at leadership development.

We are going to develop the HR Academy early on so the HR community is personally engaged in what staff in other functions will experience - some double loop learning for ourselves.

We are conscious of the need to offer varied ways of learning. E-learning is still finding its place in our business and we are looking at the possibility of more global provision of e-learning. We might link e-learning more to communities of interest.

We find that our different business functions have different sub-cultures and attitudes to learning.

For example, our technology people are receptive to e-learning, whereas this is hard to use in stores. There, staff prefer DVDs and buzz groups where they can learn on a team basis. In our call centres, people like going to a classroom and getting away from the noisy work environment.

Sharing expertise is being given high priority as a concrete aspect of organisational learning. For example, senior managers are mentoring others as part of a development programme.

Building in ROI thinking

A range of measures are used to judge the effectiveness of learning including

- employee satisfaction surveys
- customer satisfaction with learning
- programme evaluations
- observations from the line in the PDR process.

It is very difficult to attribute change to specific learning interventions. On some topics we agree an ROI approach in advance, but this is expensive to investigate. We tend to do it where the business is less convinced about likely benefits. It is easier to do with product training when a new product is coming into the market.

We do feel that demonstrating the link with the business is very important in positioning the learning community.

As well as thinking about return on learning spend, we are very conscious of the need for people to use their learning time to best effect. The idea of using time well is important if staff are being encouraged to manage their own development more.

Choices in resourcing L&D activity

The L&D and HR functions are closely linked. HR has business partners, a service centre and self-service. The L&D function has just over 50 staff in the UK. See the profile.

L&D Function Profile

- Nearly 30 of these deliver the high volume training as instructors in retail and call centres
- Smaller teams focus on OD (team effectiveness and change), general capabilities - including performance management and management development - new products/services, technology and learning efficiency such as supplier management, budgets and e-learning
- Three L&D account managers for each of our major business areas who are 'joined at the hip' with HR business partners.
- Some of our learning consultants have come from other parts of the business. We do not feel they all need to be L&D specialists, but they do need consulting, facilitation and relationship skills.

We have an on-going debate about the best way of resourcing the L&D function. At present we do the high volume training in-house - retail and call centres, for example - delivered by L&D staff, some of whom are bedded out in our big units. Most of the other training delivery is outsourced.

We are still learning how best to use third parties. We find this most difficult in areas where the requirements are fast changing or the volumes are not stable.
We might move to a position where our in-house people lead on diagnosis, design and evaluation and we outsource more of the delivery. We are also likely to expect the line to deliver more functional training.

In developing our strategy, we have learned that managers can be quite resistant to change in the learning function, and don’t like being asked to move away from a training supplier they are used to. We still have over 300 training suppliers. Embedding the relationship manager model in L&D takes time, as does linking learning better with business needs and performance management.

You also can’t stop training while you are rebuilding the function - it’s like trying to change the engine of an aeroplane that is flying.
4 The Nature and Content of Learning Strategies

This chapter gives an overview of the nature and content of learning strategies in major employing organisations obtained from the various perspectives captured through this research project. A model of the main dimensions of learning strategy is proposed and used to explore the more detailed findings in a systematic way.

As each dimension is discussed, issues and questions are raised as well as trends. These trends and emerging issues are summarised in Chapter 5.

4.1 Initial reflections on the 'perspectives'

The project started with a rather simple model in Chapter 1 (Figure 1) and an emphasis on three key links between learning and business.

- Learning strategies and business strategy: the issue of aligning learning with business needs.
- Learning delivery and learning strategy: the issue of translating a vision or strategy for learning into a set of practical activities.
- Learning delivery and the learning function: how the nature and organisation of the learning and development function supports strategic aims and delivers the kinds of activities seen as necessary.

Having discussed the research questions with 'thinkers' and 'learning leaders', four central themes were most striking:

1. Learning strategies are not just about what employees need to learn, but about why learning is seen as important and how learning will take place. So learning strategy has several dimensions, of which learning priorities at any point in time may not be the most fundamental.

2. The history of training and development activity and the current nature of the function have a profound influence on attitudes to learning and expectations of certain sorts of delivery. They also influence the capability of learning professionals in the organisation. Learning strategy and its delivery evolves in this context.

3. Organisations are advocating an approach to learning which places more emphasis on development taking place in or very near the job, and through supported experience. Learning theories by and large also favour this approach.

Note: there is still a very big gap in practice between an idealised model of supported development in the workplace and the experience of most employees. Learning leaders see the capability and attitudes of line managers as the biggest barrier to more rapid change in learning approach.

4. There is much interest in ‘organisational learning’ but considerable variation in what it is taken to mean, and the actions - if any - taken to facilitate it.

4.2 Shaping learning strategy as a process of dialogue

The participants in this study from an organisational perspective were mostly leaders of the learning (or training and development) function. As individuals they felt it was important to have a strong direction for learning activity and some clear underpinning principles.

They were also mindful that producing learning strategy documents was less important than delivering good learning interventions.

Does it help to have an explicit learning strategy?

Formal documents on learning strategy often are developed. Vision or mission statements are often used to set out aspirations for learning and the reasons why learning is important. Strategies, or strategic plans, are also written down and are couched more in practical terms of goals or priorities, activities, resources and success measures.

The more specific and practical strategic plans were seen as helpful in several ways.

- The process of drafting and agreeing strategy documents is a mechanism for working with senior managers (often at Board level) to reach a shared
understanding of what learning activity will do for the business, achieve a clear set of priorities, and ensure the resources are there to deliver the strategy.

• The same strategy documents can be a useful mechanism for learning function staff, and often their colleagues in HR, to have an input into what learning activities will be delivered and how. This may achieve some sense of ownership of the strategy by those who will deliver it, especially where the learning function is scattered and fragmented.

• Once agreed, a good strategy should help the function direct its resources and measure results.

Learning leaders were less convinced that statements of learning strategy had much impact on employees. Although these statements are often pinned up somewhere or posted on a website, employees are unlikely to pay much attention to them. They have not gone through the process of dialogue and so will not know what lies behind the statements.

This leaves organisations with a major challenge of helping employees understand what they are trying to do with learning.

Not all organisations have formal learning strategies at all. In some, learning is a part of a wider HR strategy. In others, the learning function runs on a largely implicit strategy, often agreeing specific service plans with parts of the business. Even where formal strategies exist, they only cover some of the things those in the learning function are really hoping to achieve.

It may be the nature of learning activity that it serves the organisation and seeks to change it in quite challenging ways. The practical aspects of strategy are often made explicit - whereas the underlying intention to change management behaviour in fundamental ways is more often implicit, or at least understated.

4.3 The dimensions of learning strategy

When we look at real learning strategies or discuss implicit strategies what are they about? Learning strategies, as seen in the case organisations and from documents sent in response to the e-mail survey, usually address a number of different kinds of issues, as shown in the box. We might call these the dimensions of learning strategy.

Dimensions of Learning Strategy

WHY does learning matter? What it is there to do? How do its purposes link with the overall purpose of the organisation and its context? How, if at all, does learning meet the needs of employees? If organisational learning is a meaningful concept, we would expect the WHY of learning to address the purposes of organisational as well as individual learning.

WHAT learning is prioritised? Which particular skills or knowledge or behavioural changes are prioritised in learning strategies? Which workforce groups are seen as needing these skills? How do learning priorities relate to the key challenges faced by the organisation? Are these short-term or longer-term priorities - the WHEN dimension?

HOW does learning take place? How will learning activities be delivered? For example, how will formal training be combined with other approaches?

WHERE does responsibility for learning sit? Are learning strategies corporate, divisional or more local? Do business functions take charge of learning for their employees across divisions or units?

WHO delivers learning? What is the role of managers and employees in learning? What kind of professional learning function will the organisation have? How will it operate? What kinds of staff will be needed from inside or outside the business?

SO WHAT? How can we measure the impact and effectiveness of learning activities and the work of the learning function?

Note these observations on the dimensions.

• The WHAT is often the one most visibly addressed by learning strategies, and discussed with business leaders.

• The HOW is something learning professionals are more conscious of, and most learning strategies now say something about using more diverse learning methods - especially e-learning and team interventions.

• This shift in method of delivery has major implications for WHO delivers learning and WHERE learning takes place - and therefore the structure and resourcing of the learning function.

• The hardest dimension is the WHY. Once you get beyond the very simplistic notion of 'learning to meet business needs', the interplay between learning, people and organisations raises many challenges.

• Professionals know the SO WHAT is extremely difficult to address, but are adopting helpful metrics.
We will use this WHY, WHAT, HOW, WHERE, WHO and SO WHAT structure in the rest of this chapter to report the more specific research findings.

4.4 WHY does learning matter? The strategic purposes of learning

The word ‘learning’ has stopped sounding odd in organisations and is taking root, replacing or adding to the word ‘development’ which earlier took over or was added to the word ‘training.’ The name of the function responsible for learning and the job titles of its leaders is very varied in the case organisations - but the word ‘learning’ is quite often in there, and has often been added quite recently.

Partly, of course, this is fashion and can just be a re-badging of the same old training department. In most case organisations, however, the use of the word ‘learning’ does reflect a real change in intention. Learning is about what happens inside the person - the change produced - whereas the word ‘training’ is something which is done to you or an event you attend.

Learning can also occur in many ways, especially through experiences and through doing the job, whereas training often implies some kind of off-the-job intervention.

So although the word ‘learning’ may still be a little unfamiliar to managers and employees, its use may make it easier to see the link between learning, work and performance, than the term ‘training’.

There were common themes in learning strategies or visions which addressed the WHY, but unpicking these various strands reveals quite a complex set of reasons for investing in learning in organisations.

- Learning is needed to meet business needs or business goals or to support a particular business strategy. This is often linked with the idea of ‘capability’ - the ability to do something - as the desired result of learning. If people acquire this capability through learning, the business will benefit.
- Learning is assumed to link with improving individual performance. Several organisations wanted to get away from the idea of learning as remedial and towards an idea of ‘making us even better’. The basic intention of most job-related training and development is to achieve this individual performance improvement. It is also why externally regulated training has grown in some sectors - as a safeguard against employees who do not do their jobs properly.
- Learning strategies often embrace the intention to improve succession planning and the ‘talent pipeline’. This is seen as delivering better people with the right range of experience feeding the leadership population as well as leaders who are better trained. Less often, learning is strategically linked to developing the career potential of the workforce at large.
- Learning is often seen as the means by which we manage change, so a willingness to learn as a requirement for all employees is important as they will all experience change. The increasing use of the term Organisational Development (OD) within the learning function most often refers to change management as an explicit dimension of learning.
- Increasingly, learning strategy is linked to the support of organisational values or moving the organisation towards a desired set of values or culture. We see this especially in relation to managers and leaders, but also in terms of all employees ‘living the values’ of the organisation - in relation to customer care, for example. Valuing learning is quite often itself a specific component of the desired culture.

Organisational learning

Several aspects of the WHY in the list above are often applied to the organisation as well as to individual employees. These ideas about organisational learning are expressed in varied terms and are inter-related. See the box below.

Where the term knowledge management is used it often refers to the idea of sharing learning between people and/or developing a stronger learning culture - see the BBC case. Where it is seen in terms of business information databases and technical standards, it starts to move outside the remit of most learning functions.
Indeed several of the case organisations had experience of major projects run by IS/IT departments to accumulate large volumes of written information under the banner of knowledge management. Most of these initiatives had run into the sand. There has, of course, been a considerable push from IT suppliers, using knowledge management as a platform to sell their products.

In hindsight more careful consideration of the relationship between knowledge management and learning might have been useful. Figure 2 shows how we might hope that the acquisition of knowledge and its sharing through learning mutually reinforce each other.

Some learning leaders are interested in making stronger links for employees between skill acquisition and accessing information - see the MOD case.

Although there are several ideas behind the WHY of learning, most learning strategies do present a fairly clear case for learning from the business point of view.

Why should employees comply with the organisation’s strategy?

There seems to be less clarity about what learning will do for employees. Employees in most of the strategies are certainly seen as the means by which increased organisational performance will be achieved. They are also seen as being ‘responsible’ for their learning (according to the WHO) and often engaged in learning methods they need to manage themselves - according to the HOW.

The big question ‘WHY should the employee want to do what the organisation wants them to do about learning?’ often seems to be overlooked. Consider these findings.

- In some organisations the implicit assumption is that performance-related pay may provide some kind of incentive - or is there an implied threat that if you don’t learn you will lose your job? ‘Employability’, seen as the most powerful incentive for employees to gain skills in the 1990s, seems to have virtually dropped out of sight in the learning strategies of the case organisations. Is this what happens in periods of relatively low unemployment?  
- In some organisations the link with the employee is through the idea of developing potential, and the possible link to personal advancement - see the easyJet case.  
- Mostly, however, the link between skill development and career development is notable by its absence,
except in the case of high potential staff where the two are tightly integrated - AB Foods, for example.

- In professional service organisations there is a real demand from employees for learning and this plays into the strategy in those settings, where it is also seen as positive in terms of the ‘employer brand’ - see the Ernst & Young case. Incorporating a positive learning strategy into this brand is seen as aiding attraction and retention.

“Learning is quite broadly positioned in business terms, and acknowledges both individual and business benefits.” Ernst & Young

- Where an organisation has a business strategy which incorporates a certain kind of relationship with its employees - as shown vividly by the John Lewis Partnership case - the positioning of learning in the overall psychological contract is likely to be very important. This is also the case where an organisation has a strong reputation for providing training, as in the BBC.

Learning is often linked to regulatory procedures, such that employees cannot do certain tasks unless they have been accredited in some way - employing organisations have no license to trade unless their employees meet these requirements. In sectors such as financial services, where regulation affects nearly all employees, it gives learning a particular flavour, which can feel quite negative. Learning is what you have to do to keep your job, and you have to do it often and on a pass/fail basis.

Learning in this way may be important, but it may feel like a punishment not a benefit. See the Prudential case.

So the WHY of learning seems well articulated from the organisation’s point of view, and is changing in interesting ways towards learning for change and organisational learning.

However the employee aspect of the WHY seems to be getting lost. In strategies that give the employee the major responsibility for their own learning, this seems extremely foolhardy.

4.5 WHAT learning is prioritised? Achieving business alignment

The process of aligning learning with the business

Leaders of the learning function often see their most important task as ensuring that learning activities address real issues for the business. In process terms, it is clear how this can be done, although different organisations have different strengths in the implementation of these alignment processes.

- The formal business planning processes set key business goals. The contribution which learning can make to these goals is established and built into the strategic plan for learning activity, and into service level agreements for learning delivery.

- Goals for learning can also be built into the personal objectives of senior people in the learning function, and into the personal goals of senior managers in the business.

- The Learning priorities deriving directly from the business objectives can be tempered and enriched through direct dialogue with senior individuals in the line - often seen as ‘sponsors’ by the learning function. These are normally heads of major business units and corporate functions. Personal and frequent one-to-one discussions with these individuals are seen as the most important mechanism for keeping the WHAT of learning relevant to the business.

- It seems helpful to create senior committees in the business, consisting of a few senior business sponsors plus learning function leaders, to act as the focal point for agreeing learning priorities and discussing how these will be delivered. These committees may cover the whole organisation - usually through executive board members - and/or business functions.

- When something important happens in the business which has obvious learning implications, there needs to a ready mechanism for special learning projects to be commissioned and quickly executed. Examples of this were seen in response to external criticisms of organisations - the BBC post-Hutton, for example - or major organisational change programmes as at Ernst & Young.

- The cultural purposes of learning are often articulated
through frameworks of values or competencies for managers and leaders, and also for all employees. These can include desirable items such as, for example, learning from mistakes and valuing innovation. However, it is not always clear how such frameworks are arrived at, and whether it is appropriate to simply read across from these values or behaviours to learning priorities.

- ‘Bottom up’ messages about what learning is needed are also important, but often these processes are weaker than the ‘top down.’ Potentially, this influence can come through formal or informal discussions with groups of staff, or feedback from staff or customer surveys. In theory, the personal development plans (PDPs) of individual employees can also yield information on learning priorities, but this particular ‘bottom up’ process is seldom really influential.

**Why management and leadership learning is an almost universal priority**

In case organisations, the actual priorities for learning often include improving the skills of leadership and management - and especially their people leadership skills. This is quite often coupled with succession planning and talent management processes. There seem to be at least five common reasons why management and leadership development learning nearly always comes out as a key priority.

1. Managers and leaders have not been very well developed in the past and we could do better as an organisation if our managers were better skilled.

2. Managers and leaders role model the generic behaviours and values of the organisation for everyone else. So if we want to shift the culture of the organisation, we need to put most effort into managers.

3. Training and development costs money. If we see learning as an investment, we want to put that money into the people who are most important/valuable to us - that is, our management population.

4. In more devolved businesses, the central learning function does not really have much political permission to intervene in the development of more junior or technical staff, or in job specific or technical training. However, the corporate centre has a legitimate interest in the quality of management in the business and much more political permission to initiate management learning interventions.

5. If we want more learning to take place on or near the job, and we want employees to take more responsibility for that learning, then who will support them in doing this? The answer most organisations come up with is the line manager.

   **So management learning needs to equip managers to play a greater role in supporting employee learning. It is, therefore, seen as a crucial lever on the journey to becoming a learning organisation.**

Labour economists would not necessarily agree that the UK’s learning deficit is mostly in management. They would also tend to see the junior end of management as having been more neglected in the UK than senior management (Keep and Westwood, 2003; Porter and Ketels, 2003). However, organisational learning strategies seem at present to have management learning as their most common priority.

**Generic competencies and personal development**

For similar reasons, the learning function places strong emphasis on encouraging all employees to adopt behaviours in line with the desired corporate culture. These behaviours are often articulated through a generic competence framework and/or an explicit set of corporate values. Note that sometimes

- these behaviours or values are directly business-linked - strong customer orientation, achieving results, etc
- they encompass generic or core skills - communication, inter-personal skills, etc
- they are more about attitudes - positive attitude to change, for example.

   **Learning functions find such frameworks useful as a means of communicating about core or generic skills - and also as a means of organising learning opportunities, through ‘drop down’ menus against competency lists, for example.**
Given the very strong current emphasis on organisational culture as the key to high performance, the focus on generic skills and competencies is consistent. However, in simply transposing such frameworks into priorities for learning, there are three sets of questions which organisations should really address.

1 Which of the generic competencies do we think are skills which can be improved by learning interventions? If so, what kinds of interventions?

2 For those behaviours which are more influenced by attitudes than skill, is learning the issue? What levers really change such attitudes?

3 Assuming competencies can be improved through learning activities, are some of the items in the competence framework higher priorities than others?

In this context, the use of the term 'personal development' becomes rather confusing. It seems to carry two or three different meanings when used in learning strategies.

• Personal skills, such as self-awareness, influence, etc, as opposed to technical skills.
• Development pitched at what employees want, rather than at what the business wants.
• Career development - that is, development beyond the current job.

Of course, the irony now is that the learning which is most personal, especially developing stronger generic competencies, is taken to be that which would also have greatest potential business impact.

Some case organisations usefully cut through this confusion by using clearer terms - generic or core skills (as opposed to technical), learning for now or for the future, learning to meet business needs or individual needs, as examples. See the Vodafone case.

“Technical training is essential to our operating, so it would be a ‘no brainer’ to loosen our grip on that.” National Grid Transco.

One of the real differences between organisations is whether the learning function has a fairly strong influence on this technical T&D. In those where it does, strategic learning priorities do often include specific technical learning needs and functional learning frameworks. However, technical learning is often dealt with more locally and sometimes altogether outside the remit of the learning function.

This raises an interesting issue for the learning function.

• Is it a good thing if line managers wholly manage technical learning themselves, as it puts learning in the heart of the business?
• Or, is it a bad thing because it creates a false separation between generic and technical skills when both have to come together in the way work is done?

Technical learning

The WHAT of learning strategies tends to focus heavily on these two issues of leadership and management, and generic employee skills. It is interesting to note, however, that a very high proportion of learning activity is in fact technical training - that is, focused on technical, functional, professional or job-specific skills, including product knowledge. This is 70%-80% of all training in several of the case organisations.

If one included all the job-specific coaching which cannot easily be measured in training spend, this figure would rise further. Technical training is especially high on the agenda in sectors or occupations which are externally regulated.

Short term and long term priorities

We have not included WHEN as a major dimension of learning strategy, but it is, of...
course, an issue. Learning visions or missions can be reviewed from time to time, but strategic priorities are often set annually to align with annual business planning cycles.

Some of the case study strategies were explicit about their medium term aspirations (three to five years) as well as their short term (this year) plans and goals for learning activities - see the easyJet case.

It can also be important to respond to needs that have not been built into the annual plan. The ability of the learning function to respond quickly to meet unforeseen business needs is felt to be increasingly important. This has implications for the structure of the function and its resourcing.

Some learning strategies recognise that, for individual employees, timeframe is also an issue. For example, Vodafone encourages employees to think consciously about both learning for the current job and learning for future jobs.

Does being business driven mean doing what the business asks for?

Beyond the evident need to satisfy key stakeholders by delivering what the business knows it needs, there lies a deeper set of questions about the relationship between learning strategy and business performance. It is fashionable to talk about the business 'driving' learning, but several of our learning leaders questioned whether this necessarily means doing just what business leaders ask for.

Current business leaders may not always see the learning needs that are creeping up on them. Looking externally may offer some protection from missing important issues, so benchmarking and examining research should be added to the list of alignment processes - see the MOD case.

Business leaders may also in themselves be the problem and so address learning in terms they find comfortable, without really accepting the degree to which they themselves need to change. Chris Mabey’s article raises these uncomfortable issues about learning, power and leadership behaviour.

"Achieving genuine individual and organisational learning demands serious, far-reaching and probably uncomfortable commitments and changes from senior managers, penetrating to the very basis of the organisation," he notes.

The notion of 'alignment' also tends to put the emphasis on particular skill needs or competencies, and under-emphasises the general ability of the organisation to learn and change. In learning and educational research, the meta-skill of 'learning to learn' has long been recognised. It does not often feature so explicitly in corporate learning strategies, but does surface occasionally. See the Ernst & Young case.

Most often it lurks implicitly in the strong emphasis on improving leadership and management as a mechanism for helping all employees with their own learning. It is also there in the mechanisms being developed to help employees share their learning.

4.6 HOW does learning take place?

Methods for delivering learning activities and facilitating learning

The HOW of learning strategy concerns the link between the strategic intention and how learning is enabled or facilitated through varied activities and interventions. Given that learning takes place inside the person, we should try to avoid talking about 'delivering learning', as only activities or interventions can be 'delivered'.

The role of such activities - and of the learning function - is to enable or facilitate learning.

Changing methods for facilitating learning

In discussing this link between strategy and interventions, two slightly different sets of thinking have emerged in case organisations. This first concerns the methods used in learning interventions, and the second how individuals will actually get access to these forms of learning.

A major aspect of the shift from talking about 'training' to 'learning' is a shift in thinking about how learning will take place in organisations.
This shift, described in Martyn Sloman's piece, is apparent in all the organisations we looked at - although they are different stages in implementing it.

- **Formal training** (courses, workshops etc) remains important, especially in teaching technical skills and knowledge; in meeting statutory requirements (in health and safety for example) and in maintaining a high emphasis on generic skills (such as communication) and management. Training courses have become more modular and 'bite-sized'. Some organisations are definitely decreasing the number of training courses they run, whereas others are still building up the number of modules on offer.

- **Personal support for learning** through coaching, and to some extent mentoring, is more emphasised. For some groups this may be provided by specialist personal coaches or senior mentors, but for most employees it will come more informally from their managers or colleagues.

- Other forms of experiential learning, such as projects and secondments, are seen as valuable, but are often reserved for 'special' groups such as senior managers or those seen as having high potential.

- **Action learning** sets combine experiential learning with peer support. Again this is a small volume method in many organisations, but some have experimented with much wider use of action learning sets - see the BBC case.

- **Feedback** through 360 degree feedback, development centres and so on is also seen as a learning intervention, especially used for managers.

- **E-learning** is very important in organisations where people do much of their work electronically (eg the BBC) and for communicating and testing specific knowledge (eg Prudential). It is used to very varying degrees in other organisations, and is deemed less useful for developing people skills. In some organisations (eg AB Foods) e-learning is not really a priority for development, whereas in others (eg easyJet) it seems in line with the overall business approach and will probably increase.

- In addition to e-learning packages, **electronic gateways** are also providing access to libraries of self-study materials of a more conventional kind (books, videos, etc) - see the Prudential case. We can also see the start of using ICT to support person-to-person interaction as well as person-to-machine (eg BBC).

- **Learning on-the-job** is being more strongly advocated - a strong reversal of the last twenty years over which 'sitting by Nellie' has been seen as a very inferior form of training. The emphasis on learning through working is based on the idea of 'natural learning' as built in to normal human behaviour.

As John Burgoyne notes in his thought-piece, "Learning companies and organisations function partly by having cultures and leadership styles that make them fruitful places for natural learning."

Obviously the effectiveness of on-the-job and 'natural' learning depends on the support the individual has in this environment and so is linked with the idea of coaching. Michael Eraut's contribution shows the importance of learning on-the-job, but also the need for the right 'microclimate' in the workplace and the crucial role of the line manager.

Several case organisations are asking themselves how they can design learning into work, rather than stick learning on the side of normal work processes. Project learning goals and project reviews to share learning would be examples of such practices.

Taken as a whole, these trends are often referred to by the short-hand 'blended learning'. Some organisations espouse the 70-20-10 rule, advocating seven hours of on-the-job learning for every two hours of coaching and one hour of formal training - see the National Grid Transco case.

Figure 3 below shows some of the types of learning support being offered in organisations, although some of the more intensive methods of support (formal mentoring, planned experiences, etc) are reserved for populations of particular interest to the organisation.

Current learning strategies are clearly being influenced by ideas about how learning takes place. Some of the ideas and theories which appear reflected most strongly in emerging practice were mentioned and referenced in the literature themes in Chapter 1. They include:

- the perceived power of experiential learning stemming from action learning
• the need for reflection as part of learning - from the learning cycle and double-loop learning
• the role of relationships and social interaction in learning.

Graham Prentice, for example, suggests that we need to build reflection into learning design both to make the learning more effective, but also to encourage the habit of self-reflection. Learning leaders accept the idea of individual learning styles and would wish to offer employees a range of ways they could access learning in the same skill area.

In practice, however, this is quite difficult to implement.

"If training is to be internalised and is to make you do something differently, then the reflective part of the learning cycle is crucial. This is the aspect missing both in much training design and in many corporate cultures. Learning needs to lead to improved job performance but is also necessarily about the self," Prentice notes.

None of these ideas about learning are new, but they do seem to have become much more mainstream in organisations over the past few years, especially in management development (Hirsh and Carter, 2002). One participant thought the move away from formal training was partly a cost-saving device in organisations trying to cut the size of the HR function.

Indeed, one of the survey respondents had saved £1 million by cutting formal training courses. However, cost alone does not seem to be the main driver for shifting learning methods.

**Gateways to learning**

So how do employees actually access these ‘blended learning’ opportunities? Figure 3 here, suggests some of the main access routes to learning support, as well as showing how learning activities are delivered.

Where managers and leaders are concerned, ‘programmes’ of learning are often put together which combine various methods quite explicitly. Formal training is often supported by facilitated project working - often in learning sets - and coaching or mentoring. Pre-course preparation often takes the form of e-learning access to materials and some diagnostic work - for example, in a development centre or 360 degree feedback.

In such cases, the links between these different learning activities and methods is pretty well controlled by the learning function, which is likely to be managing the programme overall.

For most employees, however, learning may appear much more of a patchwork of provision and the processes for helping staff access the learning they need may be quite weak. Organisations assume that appraisal or development review gives rise to a personal development plan (PDP), and the manager helps the individual to access the right training.

Electronic learning management systems are increasingly being used both to suggest learning opportunities and to monitor what
learning activities employees use. These systems typically offer ‘drop down menus’ of learning offerings against a need - often including the list of generic competencies in use in the organisation.

"Before the learning gateway system, people didn’t always know where to go to find out about learning. Now there should be just one place to go.” Prudential.

In the case of formal courses, the system may only show employees courses relevant to the jobs they are doing. In Vodafone, the learning system is programmed to show an individual the learning opportunities deemed to be relevant to both their current job and their current performance rating.

There seems to be a renewed emphasis on high quality induction training as a potentially important mechanism for signalling the key behaviours and values of the organisation.

In the case of training which costs money (courses, support for educational qualifications, etc) the manager usually has to agree to the individual participating. For other learning opportunities (e-learning modules, on-line reading etc), access is often entirely open and increasingly electronic.

The formal appraisal or development review is still advocated as the primary process for identifying learning needs and developing a PDP. But again, organisations know that the quality of this process is extremely variable.

When it comes to on-the-job learning, most employees are dependent on the quality and attitude of their manager or the other people around them.

All case organisations recognised, however, that current managers have a long way to go to be effective supporters of learning.

Technical learning is often organised rather separately and may be mandatory or voluntary. In some cases regulatory bodies specify how learning will be delivered as well as what it will cover.

Some organisations have strong co-ordination of functional learning from the line functional head, a functional training committee or specialist training teams bedded out in the function. Others organise technical training through operating units.

There appears to be a growth in team-based learning, especially where line managers can request a bespoke learning intervention to deal with a particular business issue or change in their team. This may look like a formal course or may include more experiential components or external facilitation of some team processes and meetings. Several case organisations had set up OD teams to deliver these interventions.

The concept of corporate universities has been adopted as an umbrella or brand.

Employee access to such development will depend on the extent to which their manager calls in such help.

The concept of corporate universities has been adopted as a mechanism for housing training and development activity under a clear umbrella or ‘brand’. The term ‘Academy’ seems to be used more often than that of ‘Corporate University’.

What Can the Terms Corporate University or Academy cover?

- All learning activity in the organisation including face-to-face as well as electronic activities and technical as well as generic training. In such cases the Academy can be a building as well as an idea - easyJet, for example.
- Management or senior management development activities of various kinds - Prudential and John Lewis, are examples.
- Functional training and development provision, with each major function having its own Academy or Centre - Vodafone and, to some extent, the BBC.

All case organisations recognised, however, that current managers have a long way to go to be effective supporters of learning.
The essential point here is that Academies are mostly a presentational device and a gateway for access to information about learning rather than a real revolution in the content or nature of learning activity itself.

These universities or academies are often virtual and are, in essence, a web-site with links to information about learning and learning materials. Some are physical learning centres as well.

Most organisations in this study used the terminology in the box above to at least some degree. In some, the corporate university or academy is quite high profile, becoming the gateway to almost all structured training and development. In others, the term is used to denote particular kinds of offerings only - e-learning, for example.

It is important to understand, however, that the terms ‘corporate university’ or ‘academy’ are not used with the same meanings in different organisations - and also that a corporate university does not denote a particular approach to learning or training. Case organisations were using this ‘branding’ concept in varied ways to define and organise learning activities and materials.

Those organisations pursuing the idea of organisational learning as both a pervasive culture of learning and as knowledge-sharing, are looking at mechanisms which encourage employees to support each other in this way.

One attractive model is of ‘communities of practice’: groups of employees across the organisation with a shared professional or functional knowledge base or particular specialist interest. See Stuart Winby’s piece and the BBC case for practical examples. Various types of meetings and electronically mediated interaction (most recently ‘blogging’) are being used to put these people in touch with each other. This gives employees access to learning from people outside their immediate working team.

**Issues in learning delivery and access**

Although the philosophical shift away from formal training to more diverse methods of facilitating learning is a progressive move, the mechanisms for making sure individual employees actually get the learning support they need are quite frail. In particular, the combination of dependence on the line manager, supplemented by quite mechanistic electronic systems, does not really offer individual employees advice on how to best meet their own learning needs.

Neither does this combination ensure employees actually action their personal development needs, especially if there is no pre-existing ‘module’ which easily maps onto their need, and if their manager is too busy or not interested in coaching them.

The philosophy of work-based learning also assumes that the context is conducive to learning, whereas the reality is often of a very task-based and hurried work setting.

> "The critical factors affecting learning efforts are the micro-climate of the workplace, the self-confidence of the worker and the role of the local manager.” *Michael Eraut.*

Within the HOW trends, there are forces pulling us in opposite directions, as shown in Figure 4 below.

The theory points us towards seeing learning as a more personal and holistic activity, best rooted in experiential learning and coaching. However the desire to offer more cost-effective formal training, linked to competence frameworks appears to offer a more atomised approach to learning through a patchwork of ‘bite-sized’ experiences - which you may also go through sitting alone at your computer.

The separation of generic and technical training also seems to play against what we really believe about how skills are deployed and how workplace culture really changes.
Ideas about how to make organisational learning a reality are still at an early stage. However, building new networks in organisations, for example through communities of practice, may lead both to new learning methods and new gateways through which employees can access learning.

4.7 WHERE does responsibility for learning sit?

Learning strategy and the organisation of the learning function are both heavily influenced by where the main responsibility for learning sits in the organisation.

This in turn is influenced by the overall business structure and the organisation of HR, of which learning is most often a part.

Most of the learning leaders in the case organisations are located in major business divisions or regional/country level, in the case of global companies. The learning presence at corporate HQ seems often to address only top executive development, with all other aspects of learning devolved.

Organisations which are more strongly integrated (eg BBC, easyJet) have corporate learning strategies and functions which cover the whole organisation.

In some cases (eg John Lewis Partnership) the corporate centre combines a hands-on role for executive development with a direction-setting role for learning as a whole. The translation of general principles into plans and activities, however, is devolved to divisions.

A second major difference in the location of learning strategy concerns the relationship between the learning function and HR.

Although nearly always reporting into the same Director at top level, some organisations have learning and HR closely integrated at local level and often at divisional level (eg AB Foods, easyJet), whereas others have more of a parallel structure for HR and learning up to quite a high level in the organisation (eg MOD, BBC).

The move to shared service models in HR is changing the nature and location of HR people, often pulling them out of local offices and into transactional call centres, leaving small numbers of business partners behind. Some of the centralised learning functions are really shared services too but, unlike HR, deliver their service more visibly in the business.

4.8 WHO delivers learning? The organisation and resourcing of learning

Although organisations are adopting similar philosophical approaches to learning delivery,
and have a number of the same business priorities, there is considerable variation in how the learning function is organised and how it resources itself.

**How the learning function is organised**

In some organisations the learning function covers all types of learning and for all employees. In others, the function has a much narrower remit for management and generic skill learning, and technical training is managed directly by functions or business units.

**Fig.5: Managing the resources of the learning function**

However organised, there is usually a need to involve technical people in technical T&D delivery. This can be achieved by bringing them into the function on a temporary or permanent basis, or by trainers working alongside experts to design and deliver appropriate interventions. Managers and leaders are also key to delivering learning and are now directly used as mentors and coaches and to give business presentations at learning events.

Now that learning functions are delivering different kinds of learning activities to different employee groups - and through different methods - the function is quite often organised into teams that have a distinct focus.

For example, Ernst & Young has five teams focusing on:

- leadership development
- performance management
- organisational development
- learning operations
- partner development.

It seems increasingly common to have an OD team to work with managers and their teams on specific issues. Such teams may also be the ‘fast response unit’ delivering bespoke interventions rather than standard programmes.

Figure 5 shows some of the main demands on the learning function and how they are frequently reflected in resource allocation to different aspects of work.

The increased emphasis on bespoke learning interventions does require a much more flexible resource, and one which can work very closely with the business.

It also needs people with the confidence, capability and credibility to design programmes quickly and to high standards.

Prudential uses the term ‘flexible bench’ to describe the way a learning need is brought to a flexible team who can then design a learning solution and deliver it, or pass it to people who can. Where bespoke learning is to be delivered electronically (all or in part), there is also the need for a rapid-response capability to develop such materials in electronic formats and make them accessible.

The ‘business partner’ model is becoming prevalent in HR and also in learning. Business
partners can sit centrally and link with business divisions or functions, or they can be located out in the business. Learning business partners need to be able to have serious discussions with senior business managers and must therefore have real credibility.

In several case organisations, business partners also deliver some training to keep their skills updated and to have real contact with employees. In some organisations, local business partners combine both HR and learning in their remit (eg AB Foods), which has implications for the skills of HR generalists in relation to learning issues.

**Although the business partner idea has appeal, it is important that their skill and credibility is adequate, and that their roles are sufficiently clear - especially where there are both HR business partners and L&D business partners.**

Outsourcing remains a feature of how learning is resourced, although not in every organisation. There is also no clear pattern to what is outsourced.

So, for example, in NGT, the pre-merger pattern at National Grid was to outsource management training but to resource technical training internally whereas Transco - the other side of the merger - had the reverse pattern. Options post-merger are partly dictated by whether there exists an external capability for some of the technical training.

It is easier to outsource programmes that will run for a while and which do not need much change over time. Suppliers include

- private training companies
- consultancies
- university business schools
- for technical training, they can include equipment or software suppliers or R&D organisations.

The criteria for choosing such suppliers will be a mix of economic value and expertise - for example, using 'management gurus' can ensure high credibility even with picky internal customers such as top managers.

Several of the case study organisations are seeking to reduce the numbers of external suppliers they use, which is

- partly about quality control
- partly about reducing duplication of provision
- partly about using larger purchasing power.

Some organisations are also seeking a much closer relationship with their suppliers so they can deliver bespoke interventions as well as standard products.

In some cases - Prudential, for example - learning suppliers are becoming strategic partners, and company employees would not know whether the person they meet comes from inside or outside the organisation. A willingness to work in this way and a degree of cultural 'fit' are becoming selection criteria for external suppliers.

> "We are still learning how best to use third parties. We find this most difficult in areas where the requirements are fast-changing or the volumes are not stable." *Vodafone.*

These variations explain to a considerable extent the very large variation in the size of learning functions. In some organisations where the function looks like just a handful of people, there are often large numbers of trainers out in the business, usually focused on specific occupations. Outsourcing obviously also has a big impact on numbers.

> **So looking at ratios of learning staff to employees is really a meaningless endeavour.**

**The skill needs of learning professionals**

The skills needed by learning function people are changing. Once there was a department of 'trainers' who used to deliver the same course over and over again. Now the function has to
move towards a learning consultant model - with people who can assess a learning need and meet it through a range of methods, pulling in other expertise as needed.

So, the learning function needs

- higher level professional skills, especially in design and evaluation
- better business, influencing and negotiating skills
- the capability to use technology.

One organisation thought that electronic mediation skills were going to be needed soon to support virtual learning sets. The personal qualities of flexibility, output focus and determination were also mentioned.

Managing an increasingly complex function is becoming a more challenging task, ensuring that resources are well deployed at the same time as building relationships with executives.

4.9 SO WHAT? How do we measure the impact of learning?

The learning function is notoriously prone to being cut in bad times, despite all the rhetoric about investing in people. Learning leaders are very aware that they need to be able to show that the learning function operates effectively as a business function and makes a positive business impact. Although it is helpful to record and measure T&D inputs - the service provided - measures of outcomes are really what we want. In attempting this, there are two big constraints.

- First, showing the contribution of learning overall to the business is almost impossible as this would mean proving a causal link between the sum of many learning interventions occurring together and overall business results.
- Second, even at the level of specific interventions, measuring business impact is problematic. The Kirkpatrick framework is still used by trainers to beat themselves up for not being able to measure behavioural change or business impact except for certain types of intervention. Some organisations talked about measuring the ROI of learning, but there was little sign of robust methods to achieve this at a macro-level.

However, learning leaders are addressing the issue of measurement in quite creative ways, and looking to a range of metrics for their function. These are just a few of the approaches found in the course of this project.

- Where there is a clear strategic plan for learning activity, were these activities carried out to the volumes planned, on time and within budget? This is a basic measure of ‘did we do what we said we would?’ It can extend beyond courses to other activities - the number of project assignments found or developmental job moves made, for example.
- Customer satisfaction with learning activities is measured either immediately, or some time after, events and through staff surveys. The Prudential’s simple rating scale for customer satisfaction with each learning event seems an attractive option.

People in its learning delivery team and its customers rate each event as either unacceptable, bronze, silver or gold. Each category has detailed criteria which must be met to achieve each of the different levels.

- Customer responsiveness - time from enquiry to delivery of a bespoke intervention, for example.
- Take up of activities or use of resources - use of e-learning materials, for example.
- Pass rate for training which represents a ‘license to practice’ in regulated environments.
- Behavioural change as a result of learning, where this is possible to measure before and after - through 360 degree for leadership skills, or sample surveys after appraisal training, etc.
- Employee attitude surveys especially as a means of tracking how employees regard the quality of management and leadership over time, including whether leaders role model the espoused values. Employees can also give a perspective on other softer metrics - the degree of support for learning, extent to which employees share know-how, how mistakes are dealt with, etc - although attributing shifts in these to learning interventions is problematic.
- Succession and talent pool cover and the ability to resource leadership positions as in an acquisition, for example, are ways to measure the quality of the leadership talent pool.
- More rigorous evaluations of specific interventions from multiple stakeholders.
- Business measures in focused areas of training -
manufacturing quality, numbers of accidents at work, customer complaints, speed to market, etc.

- More general HR metrics - attraction and retention, for example - but these are harder to attribute to learning activity.

In this chapter we have used the WHY, WHAT, HOW, WHERE, WHO and SO WHAT model to explore what is happening to learning in organisations. The model itself seems to be a simple and useful way of attending to different aspects of learning strategy and its translation into activities provided by an evolving learning function.
5 Summary of Key Trends and Questions for Organisations

This report has presented a range of perspectives on learning in organisations. Many ideas for good practice appear in the thought pieces, case studies and in Chapter 4. An exploration of learning strategies in organisations also shows that there are significant challenges in trying to apply learning theories in real organisations. This chapter summarises some of the key trends emerging from the study and also expresses some of the challenges in the form of questions for organisations.

5.1 The nature of learning strategy and the influences on it

This study has shown that there are many factors that influence learning strategies in organisations. The simple linear model presented in Chapter 1 is not a realistic representation of how learning strategy is developing in organisations.

Figure 6 shows the content of learning strategies and just some of the influences on them. The business is certainly a key influence at both corporate and local levels - but so are:

- external regulators
- current employees and managers
- evolving ideas about learning
- the history of training and development in the organisation
- changing structures for HR
- the use of technology.

This whole system of learning strategy and the influences on it are developing through time. Both external changes and the influence of previous learning activities affect what it is realistic to attempt at any point in time. The personalities of the senior people in the learning function and the relationships they form with business leaders also powerfully condition the
way the learning function can operate.

5.2 Today’s vision for learning - trends in thought and activity

Some fairly clear trends emerge both in ideas about learning and practical activities to facilitate learning in organisations.

- A shift from focus on delivering training (input) to learning (process) at work and its impact on performance (output).
- A serious attempt by learning leaders to align learning priorities with business needs. This takes place both through personal discussions with executives, and through formal structures such as Training Committees at various levels.
- Organisations are developing varied metrics for assessing the business impact of learning activities.
- A shift in learning interventions for most staff towards shorter and more modular formal training, increasing provision of e-learning modules and other resources via computer access, and greater reliance on on-the-job coaching from the line manager.
- Technical training is still important and being given due attention. External regulation in many sectors is actually increasing the emphasis on specific, and assessed, technical or job-specific knowledge.
- A desire to offer more experiential learning through projects, secondments, career moves - and more personal support through enriched feedback, coaching and mentoring. In practice, this is quite resource intensive and is usually only delivered to key groups such as managers and sometimes professional staff.
- There is much talk of blended learning but only for key groups do we find ‘programmes’ of learning activity which combine varied methods in complementary combinations and sequences.
- A shift in thinking from individual learning to organisational learning. In practical terms we see more emphasis on bespoke and team interventions as a means of bringing learning closer to the business and the job, and also becoming a more collective experience. The term OD is being used widely as a label for this type of development work, often aimed at specific business issues or major changes.
- Learning is seen as a vehicle for organisational culture change or supporting desired organisational values, often expressed through competency frameworks.
- Organisational learning is also linked with the idea of people sharing their knowledge in the workplace. Networking is being encouraged, often through ‘communities of practice’.
- The training and development function is often being re-named with the word ‘learning’ somewhere in its title. It is sometimes being structured around the different kinds of activity described above - and OD teams are emerging as a means of putting some dedicated resource into team and bespoke interventions.
- Outsourcing policy varies widely, but there is often a move to using fewer external suppliers and working more closely with them.
- ‘Business partner’ models are flavour of the month in T&D as in HR, but the roles of business partners in learning and development are still evolving.

5.3 Is today’s vision going to work? The barriers to implementation

Although the trends above seem to move us in a desirable direction, there are some significant barriers to progress.

- The workplace environment is not conducive to natural learning. Failure is punished - through blame and often job loss - employees lack time to reflect and to talk to others, and there is pressure to finish current tasks as quickly as possible. Learning is still seen as separate from working and meaning ‘time out’ from productive work. This barrier concerns job design, resourcing and social relations at work.

“Time to learn is often the biggest constraint for the learner, and senior managers need to be involved in protecting access to learning.”

Martyn Sloman.

- Managers are not ready to act as coaches or role models. Managers have not been selected in the past as learners or because they are interested in supporting the learning of others. Managers’ jobs are expanding with supporting learning being one of
many new challenges for them. The UK has under-invested in first line management training. A learning culture presents managers with more challenge from below, which is not comfortable. Role models at the very top are still often very poor. This barrier concerns how managers are selected and promoted, and the clarity and consistency of what they are asked to prioritise.

- Employees are not self-managed learners and neither are they being supported in becoming so. The new learning orthodoxy is of self-managed learners, but we know the UK has an under-educated workforce with poor learning skills. There is little time at work for learning, and managers are not ready to act as coaches. What would tempt an employee to spend hours on e-learning? Who advises them on what learning activities to undertake if their manager is not interested or skilled? What's really in it for them? This barrier concerns the place of learning in the overall psychological contract for employees, and honesty about the level of personal support most employees need in their development.

- Experiential and personalised learning is resource intensive. Exciting forms of learning activity are being introduced but only for a very small percentage of the workforce. One of the most interesting challenges is how to make serious mentoring, coaching, action learning, project exposure, etc. available to the majority of the workforce in appropriate ways. A few organisations are making real headway - with many employees involved in learning sets, for example - but this is most unusual.

- Culture change is not amenable to quick fixes. Another aspect of organisational learning is its emphasis on changing the culture of the organisation and indoctrinating employees with certain values - on lists which seem to change as often as the weather. It is not at all clear how we really expect this to happen through learning initiatives. Writing lists of competencies which are value laden and then writing e-learning modules with those names is certainly not going to do the trick. Culture and values are lived not taught. Board members need to be helped to understand that their own behaviour is often the root cause of dysfunctional workplace culture.

The learning function can spot cultural issues and build a cultural dimension into all its work. However it can influence, but not command.

5.4 Key questions for organisations

A consideration of these trends and barriers leads us to conclude that the vision of learning aligned with business needs and taking place closer to the job is undoubtedly attractive.

However, it poses massive challenges for organisations. There is a real danger that formal training will reduce for many employees - especially the least skilled and worst managed - without any real increase in 'natural' on-the-job or experiential learning, coaching, and knowledge sharing.

We can present the challenges emerging from this research in the form of seven key questions for learning leaders and executives in organisations.

Key Questions for Learning Leaders and Stakeholders in Organisations

1. Are we really directing our learning activity at improving our business performance?
2. Are our employees able and willing to learn in the way our strategy assumes they will?
3. Is our use of varied methods for facilitating learning coherent and appropriate?
4. Are we putting learning close enough to the job?
5. Are our managers and leaders champions and role models for learning?
6. Is the learning function a flexible, professional and influential partner for the line?
7. Is the organisation learning to share and really use the know-how of its employees?

Q1. Are we really directing our learning activity at improving our business performance?

The leaders of learning functions in organisations are well aware that aligning learning priorities with business needs is one of their most important tasks. Simple processes can help this happen. People in the learning function - especially the most senior - need regular one-to-one discussions with senior business leaders. It is also helpful to have standing committees that periodically review learning priorities and the effectiveness of the delivery of learning activities.
Learning leaders also need the independence of view to know when the business has a pressing problem which top level leaders are not identifying, and to look further ahead at learning needs.

More care needs to be taken in the chain of thought which links business issues or concerns with their real impact on business performance, and their link - if any - to employee skills and knowledge. Not all business issues can be resolved by T&D or even wider learning-related solutions.

Clear priorities are the first step to being able to set good metrics for the impact of learning. It can help to have a strategic plan showing main priorities, planned activities and key metrics agreed by business executives.

The discipline of evaluating learning is really just a part of taking a business-led view. Seeing evaluation as a separate ‘bolt on’ aspect of learning activity is not helpful - it really is part of business alignment.

“I find few organisations seriously start with business goals and objectives and work them through to specific learning objectives.”
Andrew Mayo.

Organisations are getting better at taking a business-led view of learning, but the current orthodoxy seems to have overlooked the rather odd nature of the current learning deal from the employee perspective. Employees, crudely put, are expected to manage their own learning so as to improve their performance for the gain of the organisation.

Their partner in this, both for giving advice and agreeing participation in most learning activities, is usually the line manager. But we know that at present many managers are not very good at supporting learning. We also know that

- most workers in the UK are not highly skilled as self-managed learners and many have left education with few qualifications and poor study skills
- many employees feel quite stressed at work and therefore their environment is not conducive to natural learning through experiment, reflection and asking others.

Organisations need to think much more carefully about why employees may be motivated to learn, and how they can get sensible advice on how to meet their learning needs.

Part of the answer to the first point seems likely to lie in positioning learning for the current job within a wider career context, so they see the link between learning now and employment in the future. Part of the answer to the second may lie in the learning function developing stronger advisory services for all employees.

New networks of employees, such as communities of practice, may open up new opportunities to learn from others in ways that may feel more interesting and personally satisfying. However, these are more likely to appeal to knowledge workers, and to people already motivated to learn, than to the majority of UK employees.

Q2. Are employees able and willing to learn in the way our strategy assumes they will?

Learning leaders are also aware that they will be judged by whether the learning activities they deliver are effective. More learning methods are...
in use and learning is being called upon to meet several business agendas including

- skilling the workforce
- influencing organisational culture
- addressing specific business issues
- supporting organisational change.

To use its resources effectively, the learning function needs a high degree of professionalism in judging which types of intervention are going to meet which business demands and also cater for varied employees.

“We are trying to develop the concept of using the right method for the right training for the right person.” easyJet.

We also need to be clearer about where training won’t work. For example, having an on-line module to match each item on a competency framework may look very tidy and comprehensive, but it will not necessarily achieve the desired behavioural outcomes. The transfer of learning into the job also needs to be built into learning design, not left to chance.

Those organisations espousing the 70-20-10 rule do not yet have mechanisms for ensuring that the 70% of learning supported on-the-job is in an environment where learning will actually take place.

We can see a tension between the delivery of increasingly atomised and ‘bite sized’ pieces of learning on the one hand - and a more holistic, personal and contextual approach to learning on the other. Most organisations are trying to combine the best of both approaches. For example, we see this in leadership programmes which may use a wide range of methods in an integrated design.

For the majority of employees, however, T&D offerings may look just like a ‘hotch potch’ of modules and resources, with very little real coaching at all.

Q4. Are we putting learning close enough to the job?

The strategic intention of organisations is often to position learning closer to work. Learning management systems and e-learning may put it spatially closer - that is, on your desk - but not necessarily intellectually or emotionally closer. Organisations may wish to consider a closer integration of generic skill development with technical or functional training. Having these two types of training separated would not seem to help employees use generic skills and behaviours in delivering technical and job-specific tasks.

Some employers are also thinking about job and work design to see how learning can be built into core business processes rather than bolted on the side.

Not having the time to learn (both on and off the job) is a major barrier both to ‘natural’ learning and to participation in formal learning activities. So, designing the time to learn into work design and resourcing would seem to be an under-used lever for change. It is of course a difficult lever to use in organisations obsessed with headcount, cost control, and task or target delivery.

Q5. Are our managers and leaders champions and role models for learning?

Putting learning closer to the job involves the line manager acting as a principal agent for learning. Nearly all organisations are trying to change the attitudes and behaviours of managers so that they become more effective partners for employees in their learning. This is seen as the cornerstone of establishing a learning culture, or a learning organisation, but it is not proving easy to achieve.

Some suggest that management training is the answer. Some go for action learning by involving managers directly in learning events held for other employees. Some feel that incentives are the problem and look to the carrot and stick of learning objectives in managers’ performance reviews to turn up the volume on this particular message.
We also need to be careful in assuming that line managers are always on hand to support learning on-the-job. Many employees do not work physically close to their managers or keep the same working hours. In extreme cases, employees only see their manager at monthly review meetings.

*The model of 'manager as coach' needs to take into account the reality of relationships between employees and their immediate line managers.*

Very few organisations in this study mentioned the selection of managers through promotion criteria which look for evidence of developing other people. This is a lever that can serve directly to avoid promoting managers who are poor at supporting the learning of their staff. If learning is closely related to looking at new ways of doing things, this may also give us more managers who are open to challenge and change.

*Those in the learning function who wish to address the deep-seated issues of learning as a part of organisational culture will therefore have to influence decisions and processes which fall well outside the area of their direct responsibility.*

Q6. Is the learning function a flexible, professional and influential partner for the line?

It looks an interesting time to be working in the learning function. Learning is certainly high on the business agenda and is moving away from a rather stale model of being the function which simply runs training courses or purchases them from elsewhere. It has the opportunity to be the part of HR in the forefront of change and closest to the business - the part of HR that is transformational rather than transactional.

We see an evolution in terminology describing the role of the function as follows:

- from training ...
- to training and development ...
- then, learning and development ...
- and moving on to organisational capability.

Of course, it is a mistake to assume that as each phase in this development unfolds, the previous roles disappear. Skilling employees for their current jobs through formal training is still hugely important and regulation is making it more so. Organisational capability and individual development are not separable, and organisational learning will become just another fashion if it is not linked to concrete approaches for encouraging knowledge sharing which is applied to real business issues.

This study suggests some characteristics of a learning function that will be able to deliver business value. In particular it needs to have flexibility and speed of response, often through creating small high-skill teams available for bespoke work. If flexibility is secured through outsourcing, external partners need to work closely with the business. The learning function needs strong ties to the business so the quality and clarity of any business partner model is very critical.

If the learning function is to reach out and help employees to access business information, it needs to work closely with other functions such as information and communication services. If it hopes to align job design, performance management and rewards so as to create a learning culture, it needs to influence business and HR strategy and processes.

**Influence, rather than empire building, is going to be the name of the game.**

The people in the learning function need to have both business understanding and professional expertise, especially in learning design and evaluation. They either need to work very closely with managers and technical experts in the business to deliver learning activities - or bring people with technical and leadership credibility into the function.

Those who lead the learning function need a particularly challenging skill set. They need to combine business understanding and clarity of analysis with cultural sensitivity, influencing skills and more intuitive responses. Over-
mechanical approaches to learning strategy and delivery are too controlling and lack emotional appeal and necessary flexibility.

**Under-analytical approaches lead to a function lacking in clear direction, structure, and the power to target its resources wisely.**

Q7. Is the organisation 'learning' to share and really use the know-how of its employees?

The idea of 'the learning organisation' is deeply attractive but also elusive. It has developed into several distinct strands of thought and activity. The strongest strands seem to be as follows.

- Ensuring that learning activity is pitched at business goals, already covered by Question 1 - the start point for all the learning leaders in this study.

- A culture which values learning, manifest through managerial behaviour which supports learning (Question 5 above), a shared approach to learning (Question 3 above) and putting learning closer to work (Question 4 above).

   It would be an organisational culture where 'natural learning' can thrive, supplemented by personal support for learning and less reliant on formal learning interventions. This cultural objective emerges very strongly from this study as the Holy Grail of organisational learning but is very difficult to achieve in our currently short-term and task-focused workplaces.

- Using the knowledge and expertise of employees better to spread good practice and solve fresh business challenges. Learning functions do see the need to encourage employees to share their expertise and also provide some of the mechanisms that may help them do this.

   Learning sets and communities of practice are two approaches which seem to be growing. Sharing knowledge may be easier when the business is doing well than when business problems are making managers defensive and employees fearful about possible job loss.

The idea of 'learning' is indeed a powerful one for organisations. It does appear to offer the opportunity to re-invent and re-energise both the way we work and the way we learn at work.

However, it involves huge changes in the way people are managed, the way the learning function works with the business, and the relationship between the employee and their employing organisation.
Appendix - Investigating Learning Strategy in Organisations

1. The nature and content of your organisation’s learning strategy

   a. Is there an explicit statement of learning strategy - or, for example, of training and development strategy? What does this contain? Who sees it? How does it reach them?

   b. What would you say are the main components of your organisation’s learning strategy, whether formal or implicit?

   c. To what extent does your strategy address the context for learning and important influencing factors - organisation culture, the role of the line, reward and recognition, for example?

   d. Does your learning strategy address issues of organisational learning as well as individual learning?

   e. What are the strategic messages about learning being communicated to staff and managers? What are employees being told is expected of them? What is the organisation promising to do for its part, through managers and the T&D or learning function?

2. Alignment of learning strategy with business and HR strategies

   a. By what processes is learning strategy formulated? Who is involved - Board, executives, HR director, wider business, etc?

   b. What factors most influence the approach to learning? Are these specific to the business and its context? Do they pick up longer term as well as short-term business needs?

   c. Are business-related objectives of learning and business benefits articulated?

   d. How does learning strategy link with wider employment and HR strategies?

3. How learning strategies are translated into practical learning activities

   a. What practical activities are seen as supporting the learning strategy and how is their balance determined? For example, formal training courses, e-learning, mentoring and coaching, action learning through assignments, secondments, or projects, on-the-job learning, team interventions including OD, whole workforce programmes, etc.

   b. How does the strategy influence the types of learning needs addressed - individual or team, technical or job-specific versus more generic competencies versus leadership requirements, for example?

   c. Does the strategy lead to concrete activities which improve organisational learning? Does it for associated areas such as knowledge management, quality and innovation?

4. The link between learning strategy and the assessment of learning effectiveness

   a. Is assessment linked into the strategy - for example through leading to clear priorities and/or measurable objectives for learning?

   b. What measures of learning effectiveness are used? How is this data obtained?

   c. Which aspects of the learning strategy are generally seen as adding most value? Which aspects of practical learning activities are generally seen as adding most value?

5. The influence of research evidence and theories or ideas

   a. Does research evidence about the nature or impact of learning in organisations influence your learning strategy?

   b. Which ideas or theories have had a significant influence on your current organisational approach to learning?

   c. Has competence-based training/learning had a major impact on learning in your
organisation? Has it improved the impact of learning on performance?

d. Have ideas on the ‘learning organisation’ taken root in practice? If so, how?

6. The response of the learning function to the strategic demands on it

a. Is there significant change in what the learning/development function is being asked to provide? If so, is this pressure coming from learning professionals themselves or from business leaders, or employees?

b. Does the learning and development function have the kinds of people - both at senior level and operationally - needed to meet the challenge of facilitating individual and organisational learning?

c. What is being done to help managers and leaders rise to their challenges in leading learning - as agents for culture change, facilitators of learning and role models, for example?

d. Is the structure and positioning of the learning function appropriate for what it needs to do? For example, centralised versus devolved, integrated with HR versus separate training function, close to the line versus remote supplier of training.

e. We have seen many models for organising learning, such as corporate universities, learning resource centres, skill owners, ‘business partner’ models, knowledge management systems, shared services, and outsourcing. Which of these ideas have made learning in your organisation more effective? Which have been ineffective?

f. What do you think your learning function will look like in five years’ time?

7. Strengths and challenges

a. Which aspects of your learning strategy do you feel are appropriate to the organisation and effective in leading to useful action?

b. Which issues are most challenging in devising and implementing an appropriate learning strategy to meet the needs of your organisation? Do you have plans to address any of these?

c. What advice would you give to another organisation seeking to design and deliver an effective learning strategy?
References and Further Reading

Relevant CRF reports

- Influence of Qualifications on Career Progress (1999)
- Corporate e-learning (2001)

References

- Argyris, C - The Leadership Dilemma: Skilled Incompetence, in Business and Economic Review 1, 4-11, (1987)


Honey, P and Kandola, P - The Learning Declaration in Action Learning News; Vol 18, No 1. See PeterHoney.com for complete text. (1999)


Huselid, M - The Impact of Human Resource Management Practices on Turnover, Productivity and Corporate Financial


Some useful websites

American Society for Training and Development (ASTD): www.astd.org

Center for Organizational Learning, St Louis University (COLR): www.slu.edu/colr

Chartered Institute for Personnel and Development (CIPD): www.cipd.co.uk, and learning website: www.cipd.co.uk/helpingpeoplelearn

Chief Learning Officer Magazine: www.clomedia.com

Human Resources Planning Society (HRPS): www.hrps.org

Institute for Employment Studies: www.employment-studies.co.uk


Society for Organizational Learning (SOL): www.solonline.org

The Manager Online Resource: www.themanager.org
Developing and Delivering a Learning Strategy

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