

# 500 TIPS

## *for* DEVELOPING A LEARNING ORGANIZATION

ABBY DAY  
JOHN PETERS  
and PHIL RACE

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500

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DEVELOPING  
A LEARNING  
ORGANIZATION

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# About the Authors

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# Introduction

It's been the buzz phrase of the '90s: learning organization. Sounds good, feels good, must be good. But, what exactly is it? And how do we become one?

We've found in our research and practice on the theme that there are many sources of information about the learning organization. Much of it, however, is wishful thinking. Some is simply a product of an academic's or consultant's imagination. After all, what do we academics and consultants have to sell apart from our knowledge? It's not as if we actually make something tangible. Learning is our product; it's what we try to deliver everyday, whether by research, writing or teaching. No wonder we're obsessed with it. But, after a while, we find ourselves in a marketing nightmare of product orientation.

Are we really able to recommend or create learning organizations? As academics, we know our own institutions are the opposite of anything we'd recommend to an external organization. We're bureaucratic, slow to change, hierarchical, removed from our customers' (sorry, students) needs and buried in our own narrow worlds of tightly-focused disciplines. In our world, the phrase multi-disciplinary (read: cross-functional) is often an insult, a euphemism for poorly-constructed, non-rigorous pop-speak. We are the last thing from a learning organization. But we'll tell you all about how to do it. At length.

Or, we can decide to write about it in 500 tips or less. We think about the difficulty of reducing complex subjects to simple, practice-based sentences, but we know we're just stalling. We know perfectly well that if an idea, philosophy, or practice can't be summed up simply and succinctly, it probably hasn't been clarified in the author's mind.

And so, we wrestled with some of the bigger, broader, hazier concepts and checked out what is really happening. We looked back through learning theory and compared it to practice, then whittled it down to practical tips. We applied what we knew about the dynamics of systems and found workable advice. The only thing we didn't do was strive for consensus.

True to our idea of the learning organization incorporating emerging learning, we welcomed the changes and shifts as our book took shape. We accepted our different viewpoints. We didn't compromise – by which we mean we didn't try to water down our different perspectives and experiences into a meaningless, diluted, single mass. We even accepted our different writing styles.

We therefore hope we've brought to you a lively book, not a sedate text. We hope you'll be intrigued, surprised, inspired and excited by the prospect of developing a learning organization.

## Who is this book for?

This book is for those wanting an intelligent, practical guide to creating a learning organization. It will appeal equally to the professional manager wanting insight and a hands-on tool, as it will to the academic grateful for a no-nonsense summary of the learning organization theory and practice. A distinctive quality is the transatlantic focus – drawing on the authors' research and experience in North America and Europe. It's for:

- professional managers, particularly those senior in human resource management;
- busy chief executives and board members, who no doubt have the term 'learning organization' buzzing at them from many different quarters;
- students of management, particularly those doing MBAs, MPhils, MAs or Doctoral work, who we hope will find this a useful study guide;
- academics in the management field, who may be curious about its concise and practical nature, including senior lecturers in the UK (Associate Professor in North America, Australia and New Zealand) professors and researchers.

## What does this book cover?

This book is structured from the most general to the most specific. We start with a dream, a vision for learning, wherein we challenge some assumptions about what a learning organization is, and come up with a few of our own. The pattern leads from a dream about an organization, to questions and ideas about how we will fit learning into our purpose and practice. Finally, slightly tongue in cheek, we carefully describe how to grab learning by the throat and squeeze its breath out of your organization.

Continuing the theme of learning, we look at different aspects of learning theory in practice, mainly focusing on the adaptable nature of flexible learning. How we look at learning depends on our vantage point in the organization. Accordingly, the second chapter takes a slice of the subject from different angles – the learners', trainers', human resource professional and the organization as a whole.

One aspect of learning we find is often neglected in the literature on organizational learning is the individual. One person at a time learns, and each person learns and finds value in learning differently. The tips in Chapter

3 focus on how each person can respond to the challenge of learning, and even the everyday challenges of life.

The fourth chapter explores the notion of learning together. Why is it difficult for people to help each other? How do we break down barriers and become closer? It probably results from getting to know each other, and understanding how our individual and shared goals merge. That doesn't mean it's easy. That's why we examine the delicate area of gender, and talk about how to establish common groundrules.

In the next chapter we move to the theme of creating systems – for what is a system but captured learning, the best we know at the time? What we want to do here is not only capture our learning, but learn from what we've captured and change it accordingly. We consider the nature of systems themselves, the management of knowledge, and one good way to embed skills and knowledge in the organization – competencies. Action learning helps us to keep all of this alive by involving everyone in questioning processes, leading to applying learning to real-time issues. This chapter then takes a dive into the quantifiable, measurable world of quality and schemes like ISO 9000 and Investors in People. And, so it should, for if learning is to really become part of the organization, it must become part of its fabric, of the texture of its hard and soft systems.

Our final chapter considers your future as a centre of learning. McDonald's has a university. Disney has a world-renowned school attracting managers from organizations all over the world. Why not you? How do you dispense with the notion that somebody else, somebody outside your organization, has answers that will work better than those created by your own people? Start by acting small, remembering what it was like to be close to the site of action, to your customers. Create a syllabus that reflects your needs in your context. Create learning advisors and professors from your own staff. Publish your findings and research. And, lastly, make sure you're celebrating and rewarding your successes.

# Chapter 1 A Vision for Learning

- 1 What is a learning organization?
- 2 Deciding on your organization's vision
- 3 Ten steps to sharing strategic thinking
- 4 Learning with and from customers
- 5 Leading a learning organization
- 6 Learning about the future
- 7 Learning alignment
- 8 Learning methodologies – terms, ways and means
- 9 Learning to learn
- 10 How not to be a learning organization: danger signs

Our opening chapter contains 100 tips, all designed to help you implement some of the most basic, but critical, aspects of being a learning organization.

The problem with the learning organization as a concept, let alone a practice, is that people don't ask, 'learning about what?' Is it OK just to be learning anything? Classical teachers might say yes, but we don't see a place for only serendipitous learning in an organization.

When we move on to considering the purpose of an organization, it's time to think about what the organization wants to be and do. A learning organization identifies present learning needs for its members and helps them to look towards the future. The next set shows you how to involve everyone in strategic planning and execution. By opening the windows of strategic opportunity to everyone, you make strategic thinking everyone's business. By accepting other people's actions and decisions, you empower them. But, that means you have to give away some of your own power.

From looking inwards, we move outwards to ask who our customers are, and what they want from us – with the biggest possible definition of 'customer'. We're thinking here of the supply chain, removing the artificial barriers between your organization and your customers and suppliers, concentrating on not only satisfying your customers and partners, but their customers and partners.

The question of how to lead a learning organization is tackled in the next set. Leadership can be seen as something of a contradiction in an organization

where people are empowered to lead themselves. We look at leadership as more of a situational, participative dynamic. What keeps it in check are the core values underpinning the activities of the organization.

That brings us to the next two sets – learning alignment and learning about the future. We offer practical advice on creating alignment between our strategic needs and what we are learning about and doing now. But, that doesn't mean we all learn the same way, or that one way to learn is better than another. Our eighth set, learning methodologies, offers suggestions about how to use the wide and diverse approaches available.

The nature of learning and how people learn is open to debate, but the sense of wanting to learn, of wondering how to learn, exists in most of us. Some of the learning experiences we have already had in our lives teach us about what worked for us and what didn't. In this set, we look at how people can learn about how they learn.

Finally, we wonder how to make sure we don't become a learning organization. What are the secrets of failure? We take some good advice from leaders in the field and turn it into how-to-tips for disaster.

# 1

## What is a learning organization?

More than one senior HR executive has been buttonholed by an enthusiastic chief education officer, who has returned from a seminar or just put down a book on the learning organization, and been told, 'We need to be a learning organization, too. I want you to work on a plan and we'll talk again at the end of the week'. But what might it all mean? Here are some of the basics. These are some of the headline descriptors of a learning organization, all of which will be addressed in more depth later in the book.

- 1 **A learning organization identifies present learning needs for its members.** Don't be afraid to be detailed about this. Think of how a school might identify the present learning needs of its pupils. Some of these will be social learning needs – who to talk to about an idea or a problem, where the fire extinguishers are, where the toilets are. Some will be cultural – how individuals are expected to behave in groups; what the norms and values of the organization are. Some will be work-based, and some knowledge-based.
- 2 **A learning organization identifies future learning needs for its members.** A school addresses future needs for its members by thinking about grown-up children's productive roles in society, as well as future educational challenges, and normally seeks to build knowledge, study skills, assumption of responsibility, self-direction and socialization sequentially, year by year. A company faces the same challenges, but also needs to forecast likely future skill and knowledge requirements based on changes in commercial, competitive and operating environments.
- 3 **A learning organization is doing something about addressing present and future needs through structured learning opportunities.** At the very least, any organization aspiring to 'learn' needs to have planned developmental activities in place which are derived from carefully assessed strategic needs, present and future.

- 4 **A learning organization is attempting to use day-to-day work experiences as a basis for learning.** We spend most of our time at work, working – not off-the-job in a classroom or study area. There needs to be a plan to harness at least some of the richness of that experience, in a programmed way, and to learn from it.
- 5 **A learning organization seeks to capture and classify the knowledge within it in a systematic fashion.** A university, where the researchers write scholarly papers about their research work, and file and store their notes, does this. Ask yourself – where is the knowledge in our organization stored? In what form?
- 6 **A learning organization provides the opportunities for that captured knowledge to be used to beneficial ends.** As well as a system for capturing and storing it, you are going to need a plan for distributing it and using it.
- 7 **A learning organization uses different approaches to learning.** If learning about the kings and queens of England was a key part of a school curriculum, a good teacher would assess and probably use a mixture of the various approaches possible to achieve that end – rote learning, role play, animated tutorial discussion, and so on.
- 8 **A learning organization responds.** A learning organization evaluates, discusses, reviews, and constantly adjusts the mix of different approaches to meet the end goal best (just like a *good* teacher would in a good school).
- 9 **Architects of learning organizations remain focused on the ends as well as the means.** If you work for an automotive manufacturer, your job is to help people learn how to make great cars, now and in the future, otherwise you will be out of business. Learning isn't an end in itself.
- 10 **Architects of learning organizations love learning and believe in it as their key to a competitive future.** Although it may not be an end in itself, the rate at which we learn, personally and organizationally, needs to exceed the rate of change around us. That's how we stay on top of change. If you don't love to learn, to help others to learn, and don't believe in learning as a key strategic imperative, you won't have the energy or the inventiveness to do what is necessary.



# 2

## Deciding on your organization's vision

Unless we know what we're doing, we're liable to do something else. The problem with the learning organization as a concept, let alone a practice, is that people don't ask, 'learning about what?' In this section, we will focus on what the organization wants to be and do.

- 1 **Why are we here?** The business of an organization is not to make a profit – that's just the fuel that keeps us going. Therefore, whether you are in the public, private, so-called 'profit' or 'non-profit', sector, the question is the same: what are you here to do, now and for the foreseeable future?
- 2 **Would the world be a worse place without us?** Moving past profit brings us to our fundamental purpose: what does our organization contribute not only to us as employees, but to our communities, to society as a whole?
- 3 **Where did we come from?** An organization's past is full with stories, heroes, villains, successes, failures, broken dreams and fulfilled fantasies. Much like human beings, an organization carries around its unique baggage in the forms of culture, policies, systems, rewards, and so on. It's sensible to review your past to get a better understanding of who you are now, and how you might go forward.
- 4 **Preserve a legacy.** In reviewing your past, identify the treasures that you want to take into the future. Creating a learning organization does not mean your past is rejected, nor does it mean you were doing the wrong things before. It's an opportunity to capture the best parts from the past and build on them for the future.
- 5 **Remember, all barriers are surmountable.** Creating a vision has nothing to do with pragmatism. There are many more tips in this chapter to help you to do that! Visions are like dreams – they are not easy to articulate or

communicate. But, by their very nature, they are somewhat ephemeral and transparent. And, that's just fine.

- 6 **There's no right or wrong vision.** Your vision is what you believe and what you want. That means it is best created with your own teams. The two-day golfing retreat for senior management is fast becoming a thing of the past. Rely on yourself and your own people, not external experts.
- 7 **Start with your ideology.** As Porras and Collins describe in their excellent book, *Built to Last* (1994), organizational visioning needs to start with core values. These are the values that are sustainable and don't change with external circumstances.
- 8 **Feel the vision. This is not purely an intellectual exercise.** People need to 'feel' the vision emotionally as well as analytically. If it's nothing but words on flipcharts, then it's not real enough. Visions need to be authentic; they need to be believed in.
- 9 **Make the process inclusive.** Unless you're working on your own – and who is? – you'll be working with other people. They have to be part of this. That doesn't mean compromise, consensus or committee, but it does mean collaborative, cooperative and cohesive.
- 10 **Articulate and simplify.** John Kennedy famously told Congress in 1961 that by the end of the 1960s Americans would put a man on the moon and have him back to earth safely. What is your organization's clear, compelling vision statement that equals the moon project, the Everest ascents or Churchill's resilience in times of war?

Porras, J, and Collins, J, *Built to Last*, Century Hutchinson, 1994

# 3

## Ten steps to sharing strategic thinking

Thinking big, thinking broadly – thinking without becoming trapped by detail. These are attributes of strategic thinking. Unlike tactical, operational thinking, the strategic thinking process offers new opportunities, not simply variations on an old theme. In a learning organization, everyone thinks strategically. Here are some tips about how to get started and how to sustain it.

- 1 **From your vision follows your strategies.** You need the big idea first (see previous section) before you can work out how to get there. Your vision is ‘why’; your strategy is your ‘what’.
- 2 **Ask everyone else, first.** If you’re pleased with your vision and confident it has been created by everyone, then you should be asking them what they think they might do about it. Doing something about realizing a vision is everyone’s job.
- 3 **Allow strategic thinking to permeate.** There shouldn’t be any rush to think strategically. Any sense of urgency usually arises because strategic thinking has become confused with planning or budgeting.
- 4 **It’s about choices, not direction.** Encourage people to make choices about their future by agreeing on what they want to do, not on how or when. The direction will take care of itself in an operational plan.
- 5 **Focus on outcomes, not outputs.** Strategic thinking is about what you want to happen, not the process by which it may happen, nor the immediate effect. An outcome is ‘80 per cent of our customers come back a second time’; an output is ‘80 per cent of our customers returned our customer satisfaction survey’.

- 6 **Ignore inputs.** An input measure is simply a reflection of what resources are being applied to a process. These may include, for example, number of staff, amount of money, number of hours, and so on. They are operational details which need to remain subservient to the broader thinking, which remains focused on outcomes. The inputs can easily change; the outcomes can't.
- 7 **Disengage from the process.** How people achieve their outcomes is really up to them. If your organization has authentic core values and a shared vision, every employee should be able to determine how to achieve the outcomes.
- 8 **Give away power.** Power does not arise from someone's position, but from the influence they gain by receiving respect from others. By opening the windows of strategic opportunity to everyone, you make strategic thinking everyone's business. By accepting other people's actions and decisions, you empower them. But, that means you have to give away power normally reserved for those in high places. (It only hurts for a second!)
- 9 **Admit ignorance.** It's a liberating, empowering feeling to hear a senior executive say, 'I don't know. What do you think?' Capturing people's energy for strategic thinking becomes easier the more they realize no one has all the answers. There are few certainties in life, and thinking about the future of an organization isn't one of them.
- 10 **Take a Zen walk.** Just when you've decided that you have a good grasp on the big picture, from external and internal viewpoints, wander outdoors and try to concentrate on your five senses simultaneously. It's impossible (for most of us), but the exercise will remind you that you, alone, do not know precisely what's going on around you at any given time. But, the combined effect of you plus others in and outside the organization will create a truer picture.

# 4

## Learning with and from customers

The business of an organization is to make and keep profitable customer and client relationships. That applies whether your money comes from individual customers or from tax sources. Customers are the people who exchange money, trust and time for your goods or services. A learning organization ensures it is meeting customer needs by learning with and from its customers.

- 1 **Ask them.** Phone them, mail them, meet them, wine and dine them – keep asking your customers how you are performing in their eyes and how their needs might be changing. Nothing is more powerful in a relationship than one party taking the time to ask the other how the relationship is going – and then doing something about it!
- 2 **Listen.** Having asked the questions, don't forget to listen! Ask open-ended questions, not those which can be answered by 'yes' or 'no'. For example, rather than ask if they like your opening hours, ask them what hours would suit them best. Don't ask them if they found your service pleasant and helpful, but ask them how they found your service.
- 3 **Listening is everyone's job.** Talking with and listening to customers isn't the job of the marketing department – it's everyone's job. (Although some research suggests the marketing department tends to hoard customer information more than any other department!) Everyone in the organization is in the position to be a part-time marketer.
- 4 **Close the complaints department.** Let's hope you don't have such a thing, but if you do and aspire to become a learning organization, get rid of it. Customer feedback, whether negative or positive, is a rich source of understanding. Customers who want to complain should be able to do that to the person responsible for the faulty goods or service. Experience

shows that an unhappy customer whose complaint is taken seriously and reconciled will probably become more loyal than a customer who has a neutral experience with the organization.

- 5 **Share the information you collect.** Whatever we hear from customers needs to be heard by everyone. Do whatever it takes to share this information: lunch-time briefings, junior management retreats, bulletin boards, intranet postings, newsletters... just make sure that customer feedback and intelligence becomes everyone's business.
- 6 **Use the information you collect.** Put customer comments on every meeting agenda. Make sure designers and deliverers have it at their fingertips when they review a project or begin something new. Make it a formal part of the strategic planning process, the product planning process, the sales planning process...
- 7 **Hire your customers.** You need not take this literally (but, why not?) to ensure that your customers become part of your design team. Too often, customers are simply presented with a product or service, or talked to annually as part of a focus group. Use them as your design consultants from the very beginning; have them use prototypes and incorporate their recommendations. In the engineering profession, this is called 'concurrent engineering'. It simply means that your products and services are being developed in real time, with real users.
- 8 **Create transparency.** Make sure nothing happens behind a customer's back that you wouldn't want him or her to witness. Ask yourselves, 'Would we mind if a customer saw us doing this, or heard us saying this?' If the answer is yes, why are you doing it?
- 9 **Think supply chain.** Remove the artificial barriers between your organization and your customers and suppliers. You are all connected in a supply chain; all interdependent and potentially engaged in a powerful symbiosis. Concentrate on not only satisfying your customers and partners, but their customers and partners.
- 10 **Synthesize strategically.** Finally, use all the feedback and understanding the organization now has to impact on your strategic vision and plan. Capturing and applying emergent strategies keeps the relationship and the organization alive and humming.

# 5

## Leading a learning organization

Don't confuse hierarchical position with leadership. Anyone can be a leader. You're a leader when people follow you, and they follow you because you can give them guidance or share expertise. Their followership is a gift; leadership is something that is given, not taken.

- 1 **Encourage people to focus on projects, not position.** Leading or even participating on projects encourages leadership development within a team and between teams, cross-functionally. The project has its own internal logic that helps people to accept and develop leadership skills arising from the situation, not the position.
- 2 **Give away power.** Empowerment occurs because power has been given from one party to another. You can't ask people to lead and then take that power away from them.
- 3 **Accept other people's decisions.** Leading involves making decisions and acting on them. Have the confidence not only to do this, but to allow others to do it.
- 4 **Clarify areas of accountability.** Leaders hold themselves accountable for their decisions and their actions. Don't assume that you or others understand each person's area of accountability. Have the conversation.
- 5 **Practice deference.** Leadership styles are modelled. Be seen to be deferring to others when the logic for leadership demands that someone else should be taking the lead. Ample opportunities present themselves for this overt demonstration of leadership style: meetings, presentations and interviews are a few examples.
- 6 **Model learning.** Never be too old or too senior to learn. Consciously, constantly and publicly re-examine your assumptions, methods and style and invite feedback from others.

- 7 **Spot and encourage emerging leaders.** Make a point of looking for people who take initiatives and are good at sharing ownership of projects. Encourage their behaviour by publicly commending them and inviting their participation on larger or more complex projects.
- 8 **Challenge and question.** Don't let anyone think that a successful organization is a stagnant organization. Always question assumptions and the status quo. A learning organization moves and responds.
- 9 **Preserve core values.** Leaders are responsive to the situation while adhering to core values. Be seen to be standing by your own and the organization's values, and demand that others do too.
- 10 **Avoid the cult of the personality.** As the old saying goes: don't tell people the time, show them how to build a clock. Resist the temptation to be personally embedded in the organizational culture as a 'great leader'. Instead, help to create a lasting impression of leadership through the organization.



# 6

## Learning about the future

We can't manage the future. We can only manage our response to it by being in a state of readiness. A learning organization is in a condition of dynamic strategic responsiveness, anticipating threats and opportunities. It maintains a heightened awareness of what's happening in and around itself. These tips will help to create and sustain such a state.

- 1 **Know your place.** Forget the planning tools that urge you to assess your external environment as if it's something 'out there'. You and your organization are part of it. Use techniques and tools which reinforce that perception.
- 2 **Concentrate on strategic issues.** The urgent will drive out the important unless you can remain focused on what really matters. Identify the issues that will affect the organization over the next two to five years, and weight them according to their apparent impact. Strategies to respond to them should follow, and be constantly reviewed and updated.
- 3 **Audit your skills and competencies.** Determine your learning priorities based on what gaps appear. Look for the competencies that enable the organization to respond to the future, as well as those which respond to the needs of today.
- 4 **Be out there.** Create liaisons and partnerships with as many other people and organizations as possible. These do not exist purely for commercial self-interest, but as a guarantee that your organization will be able to pick up signals while they are still weak and barely noticeable. Other people, not part of your organization, can become your receptors.
- 5 **Community service is not an option.** Being part of the community keeps you in touch with what's really happening. Encourage employees to assume roles in community organizations, and give them the necessary support to do so. They will not only be more aware of what's going on, but they'll be able to practice leadership and followership skills.

- 6 **Continually track and monitor strategic issues.** An issue changes in terms of its potential impact and its proximity. Issue teams can be created to take specific charge of following the progress of key issues and sharing that information within the organization.
- 7 **Challenge everything.** Ego is the reason that most people hold on to outdated products and services. If I invented it, I assume it's wonderful. Be seen to challenge your own inventions and encourage others to challenge theirs.
- 8 **Be here now.** Practise being aware of what's happening now and respond in real time.
- 9 **Don't believe your own predictions – or anyone else's.** Predictions are invariably wrong because they are usually extrapolative. Today's events do not necessarily determine what happens next.
- 10 **There is no point ten.** What made you think there would be?

# 7

## Learning alignment

In the excellent *Built to Last* (1994), Jerry Porras and Jim Collins write, ‘Far and away the biggest mistake managers make is ignoring the *crucial importance of alignment*. [authors’ italics] Most managers... fall short in eradicating misalignments’. The following tips address how you might do this.

- 1 **Walk the talk.** Address the frequent misalignment between ‘People are our greatest asset’ and the attention paid to that great ‘asset’. Consider the investment of time, effort, intelligence and resources in helping people to learn how to be a better asset to the organization. Most organizations’ budget for training and development generally runs somewhere less than that expended on potted plants in the foyer. What is the asset value of your people? How do they make a competitive difference? How could investment in their skills and knowledge give a return on investment?
- 2 **Understand emergent strategy.** When we create a plan, it often doesn’t work out quite as we intended. In fact, it’s quite often way off. That’s because the interpretations of our intended strategy change it. Intended strategy falls away, and what takes its place to create the realized or delivered strategy is emergent strategy. Emergent strategy is a function of two intangibles – organizational culture and personal or group interpretation.
- 3 **Shared values are hard work.** The values must be articulated and believed, then inculcated by whatever means possible. That requires determination and effort. In an organization that is serious about its values, those who don’t demonstrate them are rehabilitated, and if that won’t work, asked to leave.
- 4 **Create a space for sharing values.** Get all your power holders together, and all your brightest and best next-in-lines. Take them away for a couple of days. Their agenda is to put their beliefs and motivations on the table

about the organization and construct, if at all possible, the shared bits. That is – why are we in business? What will the organization still believe in 20 years?

- 5 **Aim for a group of five or six – no more – key values.** These need to be coherent, but most of all they need to be believed, because to address alignment they have to be shared.
- 6 **Write down the values one by one ('Respect for individuals').** Next to it, write down what it means. (We treat each other with respect and dignity; we communicate frequently and with candour; and so on.) Next to that, write down what that means for individuals. (We expect you to: recognize and respect the value of differences between individuals; participate actively in the performance and review process; and so on.) Then, next to that, write down what that means in a managerial role. (We expect you to: create and sustain an environment that recognizes and values differences between individuals, and so on.)
- 7 **Share them with the rest of the organization.** Put the value statements on a single sheet of paper, go back to work and deliver it to everyone.
- 8 **Put the values to work.** Finally, after a couple of iterations, incorporate all the articulated behaviours into your performance review system. That is to say, give people rewards such as pay rises and promotions for conforming to the values, and discourage people from not conforming to them by not giving them rises, not promoting them, or getting rid of them.
- 9 **Do it all again next year, and keep doing it every year.** Everything should be challenged. Learning means never standing still.
- 10 **Remember that being a learning organization isn't about being nice to all your staff.** It's about treasuring the ones who are on side and doing their best, but about weeding out and showing the door to those who are, deliberately or otherwise, sabotaging the effort.

Porras, J, and Collins, J, *Built to Last*, Century Hutchinson, 1994

# 8

## Learning methodologies – terms, ways and means

There are all sorts of names for the ways in which people's learning is fostered and facilitated. It is worth interrogating each and every term below against the questions:

- How does this help people to *want* to learn?
- How does this help people to see more about their *need* to learn?
- How does this help people to *learn-by-doing*?
- How does this make best use of learning through *feedback*?
- How does this help people to *digest* or make sense of what they have learnt?

All of the varieties of learning listed below can work well when there are good answers to the five questions above – and they can all work badly when there aren't! Apply these questions to each of the main processes that your organization uses, and see how best to optimize the potential of each learning methodology in use at present, and whether it may be worth extending the range of learning methodologies further.

- 1 **Large-group learning situations.** These include college-based lectures, open presentations, and so on. They tend to be situations where information is exchanged rather than skills being developed. However, if there is plenty of learning-by-doing during or after such events, learning payoff can be increased.
- 2 **Small-group learning situations.** These can include seminars, tutorials and workshops in college-based courses or in-company training programmes. There is more opportunity for learning-by-doing than in lectures, for example. More importantly, there is more opportunity for feedback both from fellow-learners and from the trainer or facilitator.

- 3      **Cooperative and collaborative learning.** These can happen in well facilitated group-based learning, but the terms are more often used for learning done in groups of learners without the presence of a facilitator or trainer. Such kinds of learning are essential for the on-going development of effective teams.
- 4      **Independent or individualized learning.** These terms relate to learners essentially learning on their own. We could argue that *all* learning, even in group situations, is ultimately ‘individualized’, but these terms are usually used in contexts such as some of those mentioned below.
- 5      **Open and flexible learning.** These terms are usually used for situations where people learn from resource materials, and there is at least some degree of flexibility in where they learn, when they learn, and (particularly) at what pace they learn. We could argue that *all* learning actually happens at learners’ own pace, but that not all teaching or training does!
- 6      **Distance learning.** This term is usually used for open or flexible learning processes, where there is a ‘distant’ organization (such as a college, open university) supporting the learning, and administering assessment or accreditation of what has been learnt. Communication with this distant organization may be through a tutor. There may or may not be tutorials or other face-to-face meetings. There may be postal or electronic communication for support and assessment.
- 7      **Resource-based learning.** This is a buzz term for learning achieved through learning resource materials, usually (but not necessarily) independently. It’s so popular a buzz term that it has led to the acronym ‘rbl’ or ‘RBL’ – both of which could also stand for ‘responsibility-based learning’, as quite a lot of the onus for keeping going rests with learners.
- 8      **On-the-job learning.** Workplace learning focuses on learning-by-doing, including sometimes learning through mistakes. In practice, it is probably how most important things are actually learnt, even when people start work after long periods of education or training.
- 9      **‘Sitting by Nellie’ learning.** This is specific on-the-job learning, where the learner spends time working alongside or shadowing someone who is already competent or skilled in the area to be learnt. However much training or education people have already had, they may continue to expect to learn a lot from Nellie!
- 10     **Continuing Professional Development (CPD).** This can make use of any or all of the forms of learning mentioned above, and relates to the continuation of learning and development as an embedded part of career progression. The term ‘lifelong learning’ is parallel to this, not just relating to career progression.

# 9

## Learning to learn

This is the most important thing that human beings ever learn. For a learning organization, it is vital that everyone is fully aware of the natural processes underpinning human learning, so that they can take control of these consciously, and develop them systematically. The following suggestions may help you to keep learning-to-learn uppermost in your organization.

- 1 **Remind people how long they've been learning to learn.** Ask them to reflect on just how much they actually learnt during the first two or three years of life. Remind them that most of this learning they did more-or-less under their own steam, without any conscious thought about teaching, training, or even learning. Remind them that they still own the brain that did all of this, and can still use it to learn vast amounts of new knowledge, skills and competencies.
- 2 **Ask people about their learning in school and college.** They will have learnt large amounts of information, and will have forgotten most of this! Also, however, they will have learnt a great deal about *how* to take in knowledge and information, and will still have this skill.
- 3 **Remind people that they never stop learning to learn.** Talk to senior colleagues, and retired ones, too. Ask them what they have learnt only recently. Ask them *how* they learnt it. Ask them what they found out about themselves while learning it. Then ask them which of these was the most important and most interesting to them.
- 4 **Provide programmes for people to learn about learning.** Training programmes can help people to tune in to the power of their own minds. A good learning facilitator can help people to gain control of the processes by which they learn most efficiently. Many people find it useful to explore how their minds work in the company of other people, and learn from each other's experiences.

- 5 **Provide resources to help people to learn about their own learning.** Not everyone is comfortable attending a training programme about learning to learn. Some people fear that inadequacies or deficiencies may be exposed. Computer-based or print-based packages that help people to explore their own learning in the comfort of privacy may be more attractive to such people.
- 6 **Get people asking themselves, ‘What did I learn about *myself* when I learnt this?’** Learning to learn is closely connected with understanding one’s own mind, and one’s own preferences and choices.
- 7 **Get people asking, ‘What really worked when I learnt this?’** The chances are that the factors that made one element of learning successful will be transferable to their next element of learning. There are long words for this, such as ‘metacognitive processing’, but it’s simply about helping people to look inwards at what works for them when they learn, and what doesn’t.
- 8 **Get people teasing out what slows their learning down.** The more we all know about how the brakes work, the better we can use them only when we need them.
- 9 **Legitimize learning-to-learn in the appraisal cycle.** If your organization uses regular appraisal or review interviews, include the agenda of what people have learnt about their own learning since the last interview.
- 10 **Get people to articulate ‘learning-to-learn’ targets.** Target-setting should not just be about gaining further knowledge, competencies or skills, but should include setting out goals relating to the further development of a learning toolkit of approaches and methods.



# 10

## How not to be a learning organization: danger signs

Here we distil the wisdom of some of the best management thinkers – Rosabeth Moss Kanter, Peter Drucker, Tom Peters (and ourselves!) – and offer the best guaranteed ways possible to NOT become a learning organization.

- 1 **Big is best.** We can centralize and go for economies of scale. Well, the Soviet Union couldn't pull it off in the end, and they had 70 years of practice and the best central planners in the world planning it.
- 2 **Low cost production is best.** An obsession with low cost drives down quality and drives out value creation, as well as driving out your best creative people. Cost control is crucial but it can't be the whole story.
- 3 **Analysis will win the day.** If we get enough data we can know exactly what to do. Ever heard of analysis paralysis? Don't be sitting around writing plans about plans while the world changes around you. As Peter Drucker reminded us, plans have to degenerate into action.
- 4 **Don't rock the boat.** We have a plan – let's stick to it. Being decisive sometimes means being decisive about changing your mind. Sticking to a plan when it is obviously not working out isn't decisiveness – it's stupidity. Don't try to silence all your dissidents or all you will have left are yes-men and women.
- 5 **Managers make decisions.** Get the focus of decision-making as close to the action as you can. Managers are servants, paid to help others to do a great job. If their job is to make judgements on innovations, they will invariably slip into negativity and say 'no' far more often than 'yes'.

- 6 **Control everything.** Know what to control and what to leave alone. There is a difference.
- 7 **Get cash incentives right if you want to motivate people.** A lack of money can very easily be a demotivator, but it doesn't usually inspire people. Vision, creation, achieving something difficult and valuable, feeling valued and respected – those are the 'incentives' which motivate.
- 8 **Inspect to assure quality.** If quality isn't there at the beginning it can't be inspected. Get it right first time and inspection becomes a failsafe, not a necessity.
- 9 **All businesses are the same.** If you can manage the finances and return on assets, you can manage anything. The diverse conglomerate can work sometimes, but more often than not, venturing outside the core of a corporation's understanding leads to disaster.
- 10 **Don't stop growing.** And grow faster all the time. Growth is a by-product of a successful firm, not a target which makes a firm – or a government, for that matter – successful in itself. Small can be beautiful, too.

## Chapter 2     A Flexible Approach to Learning

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Flexible learning is just what it sounds like. It's an approach that allows people to adjust their personal learning to fit with work and family commitments, and also helps them to work at their own pace at a time they choose.

In our first set of tips, we offer 10 reasons why we think flexible learning is a good idea – all based on the single concept of freedom: freedom from other people's schedules, freedom of pace, freedom of location, to name a few. Part of that freedom can be gained from a resource-based approach. Our second set of tips examines resource-based learning (RBL). The emphasis on learning-by-doing satisfies many people, as does the flexibility of learning materials.

All the reasons why flexible and RBL can work won't make sense from everyone's point of view in the same way. That's why the next four sets of tips are devoted to looking at the potential from different perspectives. The learner, for example, will be saying 'what's in it for me?' Trainers, from the traditional school, may instead be wondering what threats it may pose. This set of tips describes a move from 'training' manager to 'learning' manager.

The next two sets of tips widen the perspective even further, to encompass the organization as a whole. We look at flexible learning through the human resource professional's eyes, where strategic issues and learning alignment is the focus. We then give practical guidance on how the whole organization can benefit from flexible learning: less off-the-job training, more relevance, more feedback and, ultimately, more ability to deal with the unexpected.

The last two sets in the chapter help you to choose your materials, whether they are published learning materials or computer-based. Questions to ask,

features to look for and ways to judge quality are all included. The objective of these sections is to remove the mystique and potential confusion which may exist, and help you to choose the sorts of materials and packages which will fit with your organization's learning needs.

# 11

## Why use flexible learning?

Flexible learning can play a major role in a learning organization, as it helps people to adjust their personal learning:

- to fit in with work commitments;
- to accommodate family commitments;
- to enable them to work at their own pace, place and times of their choosing.

There are many ways that learning opportunities for personnel can be made more flexible. The following points may help you to see where flexible learning can fit in to the human resource development profile of your learning organization.

- 1 **Flexible learning comes in many forms.** The term 'open learning' is often used, or 'resource-based learning'. 'Distance learning' is where learning is supported and administered from somewhere outside the organization. The common factors in flexibility are outlined in the points below.
- 2 **Flexibility can mean freedom of start dates.** Many open learning programmes are described as 'roll-on, roll-off' systems. The key feature here is that learners can more or less start at any time of the year, and finish when they are ready.
- 3 **Flexibility can mean freedom of entry levels.** It is important to spell out clearly any prerequisite knowledge or skills associated with a learning package or programme, so that people can tell whether they are able to progress on to working with each package.
- 4 **Flexibility can give people some choice of how much support they use.** Tutor support may well be available to learners on a programme, but some may make little use of this, and still succeed without difficulty. Some people prefer to learn on their own, and rise well to the challenge of sorting out their own problems.

- 5 **Flexibility can offer some freedom regarding levels of motivation.** People can decide whether to put in the minimum amount of work to be 'safe' in their learning, or whether to follow up strong interests and go much deeper into what they are learning.
- 6 **Flexibility can mean freedom of pace.** This is one of the most attractive hallmarks of many open learning programmes. Especially when studied by mature employed people, freedom of pace may be an essential feature, allowing them to fit their learning into busy or unpredictable work patterns.
- 7 **Flexibility can allow freedom of location.** Flexible learning can allow people to continue their studies while away from the organization on work-related business, or on vacation, or even when confined to home by temporary illness.
- 8 **Flexibility can mean freedom of choice of learning environment.** People can have more choice about whether they study in their offices, in a library or learning resource centre, at home or wherever they feel comfortable.
- 9 **Flexibility can mean freedom of end-points.** In some flexible learning systems, students can go in for assessments (tutor-marked, computer-marked, and even formal exams) more or less when they feel that they are ready for assessment.
- 10 **Flexibility can allow people to learn collaboratively or on their own.** Some people may not have much opportunity to work collaboratively.

# 12

## Using resource-based learning

Resource-based learning (RBL) is a term in sufficiently common use that an acronym exists from it. In the strictest sense, all learning could be considered to be resource-based, where the resources include handouts, lecture notes, textbooks, journal articles and human trainers or tutors. However, the term resource-based learning is usually used in circumstances where the learning that takes place from these, or other types of learning resources, is somewhat different from that which happens in traditional teaching-learning formats. The following suggestions may help you to put resource-based learning to appropriate use in your learning organization.

- 1 **Resource-based learning can be considered to be open or flexible in nature.** Open learning packages are learning resources in their own right, whether they are print-based, computer-based or multimedia in design. The learning that happens in resource-based learning usually opens up some freedom of time and pace, if not always that of place.
- 2 **Resource-based learning suggests that the subject content is provided to learners through materials rather than via teaching.** The term 'resource-based' is often used as an 'opposite' to 'taught'. Having said that, good practice in face-to-face teaching and learning often depends on learners working with learning resources during sessions, as well at outside formal contact time.
- 3 **The learning that happens in learning resource centres is usually considered to be resource-based.** This suggests that resource-based learning is often based on kinds of open learning resources which are best located in a particular centre, with the opportunity of technical or tutor support as may be necessary, rather than materials that learners take with them to their homes or workplaces. In practice, resource-based learning is regarded as being delivered *through* such centres, and includes considerations of the physical environments experienced by learners.

- 4 **Learning resources can be quite traditional in nature, too.** With suitable study guides or briefing notes, resources such as textbooks, videos, audiotapes and journals can all be part of resource-based learning programmes, either when located in learning resources centres or libraries, or when issued to or borrowed by learners.
- 5 **People may require appropriate induction into how resource-based learning should best be approached.** In particular, it is important for people to be aware of the ways that the resources are designed to help them to learn, and how to keep track of their own progress.
- 6 **Resource-based learning usually accommodates a considerable amount of learning-by-doing.** Resources should provide people with opportunities to practice and to learn by making mistakes in the relative comfort of privacy.
- 7 **Resource-based learning depends on people being provided with feedback on how their learning is going.** This feedback can be provided by human trainers, or by interactive elements within the learning resources, where feedback to learners may be provided in print or on-screen.
- 8 **Clearly expressed learning outcomes are important in all kinds of resource-based learning.** There may not be human support available at all times, and that tone-of-voice, emphasis of tone, and facial expression may not be available to help learners to work out exactly what it is that they are expected to become able to do as they work with the resource materials. This means that the wording of the intended learning outcomes is crucial.



# 13

## Benefits of flexible learning for learners

‘What’s in it for me?’ is a natural question for people to ask, especially if their previous education or training has been delivered using conventional or traditional teaching and learning processes. It is important that people are alerted to the benefits that can accompany flexible learning. The following are some of the principal benefits, written along the lines that you could explain them to people who are about to undertake flexible learning for the first time.

- 1 **You can learn when you want to.** This means that you can make use of down-time at work, or at any time of the day or night when you can find time to study. You may even be able to start and finish your studies at dates of your own choosing, rather than have to fit in with course start dates and finish dates.
- 2 **You can learn where you want to.** With print-based (and some computer-based) packages, you can choose your own preferred learning environment. Better still, you can have some of your learning materials with you everywhere you go, allowing you to do at least some studying in each of many different locations – at home, at work, in colleges, in libraries, on trains, in waiting rooms – almost anywhere.
- 3 **You can learn at your own pace.** You don’t have to worry about how fast you’re learning, or whether other people seem to be faster than you. When you find something difficult, you can simply spend more time on it.
- 4 **You know where you’re heading.** Good flexible learning materials have well expressed learning outcomes. You can go back and look again at these at any time to remind you of what you’re trying to become able to achieve. You can read them as many times as you need to, so that you get a real feeling for what is involved in them.

- 5 **You can see what the standards are.** Tasks and assignments in your learning materials will give you a good idea of the level you should aim to meet. You can scan these in advance to alert you to what is coming up.
- 6 **You can get things wrong in the comfort of privacy.** Learning by making mistakes is a productive way to learn most things. With tasks and exercises, you can afford to find out which things you are confused about. When you know exactly what the problems are, you're usually well on your way to solving them.
- 7 **You get feedback on how your learning is going.** The feedback responses to task questions will confirm whether you are getting the hang of the material. When you get something wrong, the feedback may well help you to find out *why* you did so, and won't just tell you what the correct answer should have been.
- 8 **You can decide what to skip altogether.** For example, if you think you can already achieve a particular learning outcome, you can have a go straightaway at the related tasks or exercises. If you know you can already do these successfully, you can skip them and go straight to the feedback responses to check that you would have succeeded.
- 9 **You can keep practicing until you master difficult things.** When you have problem tasks in your learning materials, you can have another go at them a little later, to check whether you still know how to deal with them.
- 10 **You can stop when you're tired or bored.** Successful learning tends to happen in bytes rather than megabytes. When you're flagging, you can have a break, or go backwards or forwards to some other part of your learning materials that you find more interesting.
- 11 **You become more confident.** Taking charge of your own learning helps you to develop your own self-esteem and autonomy as a learner, and this helps you to make the most of each and every learning opportunity you meet.

# 14

## Benefits of flexible learning for trainers

For those staff in a learning organization whose job is training and people development, the introduction of flexible, resource-based learning can be seen as a threat. The following points are addressed to trainers, aiming to convince them that they too have a lot to gain from making good use of flexible learning in their support of a learning organization.

- 1 **You won't have to train about the same things over and over again.** With flexible learning materials, the things that you train about most often (and perhaps sometimes get bored with yourself) are likely to be the first areas which you decide to package up into flexible learning options.
- 2 **You won't have to explain the same things over and over again.** In face-to-face work when training, it often happens that you seem to be repeatedly explaining the same things to different people. The same mistakes and misconceptions occur frequently, and you may lose enthusiasm for putting people right about these. With flexible learning, you may be able to package up your experience of explaining such things to learners into a form where they can benefit from your explanations without you having to keep delivering them.
- 3 **Flexible learning can help you to deliver more training.** With flexible learning, much of the actual learning will be done by people in their own time, and your task becomes to help them to navigate the course of learning resource materials rather than to go through all of the material directly with them.
- 4 **Flexible learning can help your trainees to develop important personal skills.** These include working with learning resources independently, practicing self-evaluation, becoming better at time management and task management, prioritizing the relative importance of different parts of the

learning materials, and using fellow learners as a resource. All of these skills are useful in a learning organization.

- 5 **Flexible learning can refresh your training practice.** Getting involved in flexible learning causes trainers to re-examine their approaches. This can lead to refinements in your face-to-face work with trainees.
- 6 **You can focus your skills and experience on areas where people really need your help.** Your role supporting flexible learners moves towards being an expert witness for those questions where they really need your experience to help them.
- 7 **You can move towards being a learning manager.** This helps you to have more time and energy to focus on individual trainees' needs and difficulties, rather than simply delivering the content of the training programme.
- 8 **You may be able to escape from some things you don't enjoy training.** You can do this by packaging up those parts into flexible learning formats. This has benefits for your trainees as well as for you, as if you're teaching something you're fed up with, the chances of them becoming enthused by such topics diminishes, and their learning would not be likely to be very successful.
- 9 **Flexible learning can make your job more secure.** Although many trainers fear that they could make themselves redundant by moving towards flexible learning, in practice the reverse tends to happen. Staff who can generate or support flexible learning often find themselves even more valued. The diversification of their skills opens up new ways in which they can deliver learning and training.
- 10 **It is less of a disaster if you're ill!** In face-to-face programmes, it can be a nightmare if you are not able to deliver important parts of a training programme, or even if you lose your voice and can't give presentations. When flexible learning materials are available, it is often possible to use these at times when you are unable to run a training session.

# 15

## Benefits of flexible learning for human resource professionals

Flexible learning helps human resource professionals align strategic organizational needs with individual learning portfolios. It can make the organization more competitive, use resources more cost-effectively and help the organization to evolve towards becoming a learning organization.

- 1 **Flexible learning widens the range of training needs that can be addressed.** At times, when the viability of courses and programmes depends more sharply on economics, many useful programmes become untenable for financial reasons. Flexible learning can prove more cost-effective in such cases, while maintaining a desirable breadth of training provision.
- 2 **Flexible learning can make your organization more competitive.** This is more to do with the breadth of learning needs or training needs that can be addressed, than about the unit cost averaged out over students or trainees. Competitiveness is also linked to your organization's ability to respond to diverse requirements regarding the time-scales of provision, and the extent of support required by learners.
- 3 **Strategic commitment by senior managers to flexible learning can underpin success.** When flexible learning is supported top-down in an institution, the other requirements tend to fall into place, including appropriate information technology formats for flexible learning delivery, relevant staff training provision, and well thought out resources deployment.
- 4 **Flexible learning causes fruitful development for your trainers.** One of the most significant payoffs of becoming involved in delivering or supporting flexible learning is that staff look again at how best to support *learning*, rather than just how to train. Many trainers report that things

that they found out through supporting flexible learners change their practice significantly with face-to-face students or trainees.

- 5 **Flexible learning helps to develop a multi-skilled staff.** Trainers who get involved in designing or supporting flexible learning learn a variety of new skills, which can pay dividends to a learning organization. For some staff, the new challenges and demands associated with delivering flexible learning enrich their professional practice, and bring new enthusiasm to their work.
- 6 **Flexible learning is not about dispensing with people.** When used wisely, flexible learning can be a means of giving trainers more opportunity to do the things that are *best* done by people. Much of the routine transmission of information to trainees can be achieved using learning resource materials. This gives your staff more time to concentrate on applying high-level human skills to support trainees and to exercise their professional judgement.
- 7 **Flexible learning can make more cost-effective use of your resources.** For example, flexible learning can continue for almost all weeks of the year, making good use of learning resources centres, libraries, computing facilities, as well as of trainers. Care needs to be taken, however, to ensure that all staff have adequate opportunities both to plan and take holidays and other kinds of absence, such as attending training programmes themselves or participating in conferences and meetings.
- 8 **Flexible learning can reduce peak-demand levels.** For example, with 'roll-on, roll-off' flexible learning programmes, trainees are not restricted to starting at a particular time of the year. There can be choices of start and finish dates, and fast-track possibilities for the most able trainees as well as 'slow lane provision' for people whose time may be very limited.
- 9 **Flexible learning helps to move towards being a learning organization.** The people-centredness of flexible learning can become a driving force extending throughout the organization and transforming traditional face-to-face training, as well as support offered, to people learning throughout the organization. It can cause attitude changes, which break down the barriers between managers and personnel.

# 16

## Benefits of flexible learning for organizations

The benefits of flexible learning are well appreciated by those employers or managers who have been successful open learners themselves – a rapidly increasing group. For some, however, open and flexible learning seems rather different to the way that they remember their own education or training. Some of them still equate effective learning with attending classes. The following benefits associated with flexible learning are worded especially for senior staff who may need convincing that it is worth investing in as part of the training strategy of a learning organization.

- 1 **Your staff will have a better chance of learning relevant things.** The flexibility provided by learning packages means that it is often possible to choose training materials that are directly suited to learning needs relating to the workplace.
- 2 **You can see the relevance of each learning programme.** Because flexible learning programmes are normally based on clearly stated intended learning outcomes, you can check how useful the achievement of these outcomes by your staff will be for your own organization.
- 3 **Flexible learning is based on learning-by-doing.** Therefore, your staff will be learning more from practicing and applying the skills, concepts and ideas that they are encountering, than might have been the case if they had merely attended courses where trainers talked about the subjects being learnt.
- 4 **Flexible learning materials provide feedback to each trainee.** In traditional face-to-face programmes, trainees may have to wait for feedback on their progress; with flexible learning they get much of the feedback at once from the learning resource materials, while their attempts at tasks and exercises are still fresh in their minds.

- 5 **Most flexible learning programmes use trainer support.** At best, this support is focused towards those aspects of their studies where learners need human judgement from an expert witness, and away from routine feedback on common problems, which can be built into the learning resource materials. In effect, this can mean that the human interventions of trainer support are much more significant and useful than they sometimes are on a traditional training programme.
- 6 **You can judge the standard of the training.** Flexible learning materials include self-assessment tasks and exercises, and maybe also tutor-marked assignments, all of which help you to see the standard to which your staff are being trained. The assessed components of open learning materials and programmes help you to monitor the actual level to which the intended learning outcomes can be expected to be achieved by your staff.
- 7 **Employees will develop themselves as autonomous learners.** This is one of the most significant payoffs of flexible learning. The skills that open learners necessarily develop or improve include time management, task-management, taking charge of their own learning, learning from print-based or computer-based resource materials, as well as taking most of the responsibility for preparing themselves for assessment. All of these skills make people more resourceful and valuable in a learning organization.
- 8 **There is less time off-the-job.** Flexible learning allows staff to learn in the workplace, during down-time or quiet periods, as well as to extend their studies to home-based learning. The amount of travelling time to a training centre or college is reduced or even eliminated.
- 9 **Flexible learning helps your organization to cope with the unexpected.** When urgent needs demand that staff cannot be released to attend timetabled training programmes, open learning allows them to catch up on their studies when the immediate requirement for their presence has been accommodated. This allows you to reduce the occurrence of key staff being unavailable for unanticipated important work, due to being off-site on training programmes.
- 10 **You can make further use of learning resource materials.** When some of your staff have successfully completed flexible learning courses or elements, the materials that they have learnt from may still be available to you to spread to other staff. The resource materials are much more permanent than the transient experiences of staff attending lectures or training workshops. It is much more difficult to cascade live training than flexible learning.



# 17

## Choosing published flexible learning materials

Flexible learning resources can be a vital tool to help everyone in a learning organization to continue to learn. One of the problems with commercially available learning materials is that some look good, but just don't work, and others work well, but don't look attractive. Much published material falls between these two positions. The following suggestions may help those with the responsibility for selecting learning resource materials to choose wisely.

- 1 **Look first at the intended learning outcomes.** If these are well expressed, and in language that people will be able to understand easily, the materials are off to a good start in your interrogation. It is also desirable that the learning outcomes are written in a personal, involving way, so that your personnel will feel that the materials are directly suitable for them.
- 2 **Check how interactive the materials are.** There should be learning-by-doing opportunities throughout the materials. This is better than just having a collection of tasks or activities at the end of each section or module. Check whether the tasks and exercises are pitched at an appropriate level, so that they could give your people useful practice, and the chance to learn from anticipated mistakes.
- 3 **Check how well the materials *respond* to people using them.** Look particularly at the responses to self-assessment questions or tasks. In good materials, these should be considerably more than simply answers to the questions. People should be able to find out not only whether their own attempts at the questions were successful or not, but should also be able to find out easily from the responses what might have gone wrong with their own attempts when unsuccessful.
- 4 **Check the standards.** The standards to which the learning outcomes will be delivered should be most clearly evident from the levels of tasks in the materials.

- 5 **Think about the tone and style of the materials.** Most flexible learning materials work better when the tone and style is relatively personal and informal. The materials should be involving, with learners addressed as 'you', and when appropriate the authors talking to learners as 'I'. Check, however, that the tone won't be found patronizing by your people.
- 6 **Think about the ownership issues.** For example, if the materials are designed for people to write all over them, filling in answers to questions, entering calculations, sketching diagrams, and so on, they are likely to get a high degree of ownership of their learning from the materials.
- 7 **Look at the layout and structure of the materials.** For people in your organization to trust learning materials, the materials should look professional and credible. People should be able to find their way easily backwards as well as forwards through the materials.
- 8 **See whether you can get feedback on how well the materials actually work somewhere else.** Check whether there are other similar organizations already using the materials, and try to find out how well they are doing their job there. Reputable sources of published learning materials will normally be only too pleased to provide details of major clients.
- 9 **Check the costs involved.** There are different ways of 'adopting' flexible learning materials. These range from purchasing copies in the numbers you require for your own people, to acquiring a site licence to reproduce your own copies at will. If you are dealing with a minority specialist option, the economics will probably favour buying copies directly. Bulk discounts may be available for significant purchases.
- 10 **Check carefully the match between the published learning outcomes and those of your own training programme.** It is normal to expect some differences. Some of your own learning outcomes may be absent from the published materials. The materials may at times go well beyond your own learning outcomes. It is important to establish what fraction of the published materials will be directly relevant to your own training programme.
- 11 **Seek out reviews of the learning materials.** Just as with textbooks, reviews can help you to make decisions about which to adopt and which to reject; reviews of flexible learning materials can be useful indicators of their quality.

- 12 **Decide whether the materials are sufficiently up to date.** A quick way to do this is to look for references to 'further reading', or tasks briefing users to make use of other reference books or articles on the topics covered.
- 13 **Estimate the expected time that people may need to spend using the materials.** There are often indications of this built into flexible learning materials, but you may need to work out upper and lower limits that would reasonably relate to your own least able and most able learners.

# 18

## Choosing computer-based learning materials

Much of the foregoing discussion about interrogating published print-based flexible learning materials can readily be extended to computer-based materials. For example, many of the questions about how well the materials will support flexible learning continue to apply, and the issues of whether the material is authoritative and up to date, are still present. The following additional suggestions may help you to select suitable computer-based resource materials to support flexible learning in your organization.

- 1 **Remember that it's harder to get a good idea of the effectiveness of computer-based materials than for paper-based ones.** This is not least because it is not possible to flick through the whole of a computer-based package in the same way as is possible with a printed package. It can be quite hard to get a feel for the overall shape of the learning that is intended to accompany a computer-based package.
- 2 **The best first step to evaluate a computer-based package is to work through it yourself.** Alternatively, get someone who knows a reasonable amount about the topic to work through it, and ask how well the package would be likely to help someone who didn't yet know as much.
- 3 **Prepare your own checklist to interrogate computer-based materials.** Decide the questions that you need to ask about each possible package, before committing yourself to purchase. Questions could include:
  - Are the materials supplied with workbook elements?
  - Can support materials be freely photocopied?
  - What is the standard of the equipment needed to run the packages effectively?
  - What level of technical support and backup will be required?

- Does the software include individual user progress monitoring and tracking?
  - Do the materials make good use of pre-test and post-test features?
  - Can the materials run effectively on a network in your organization?
  - Are there licensing implications if you wish to run the package on more than one machine?
  - Can you afford multiple copies if the materials are multimedia, single-access packages?
- 4 **Check the stated intended learning outcomes.** Most computer-based packages either present these on-screen towards the beginning of the computer program, or specify them in accompanying documentation or workbooks. One danger is that such documentation often becomes separated from the actual terminal or computer, and people using them may be entirely dependent on what they see on-screen to set the scene for what they are about to study.
- 5 **Try to establish the pedigree of the software.** Some computer-based packages have been thoroughly tested and developed, and have been updated and revised several times since their launch. Such packages normally give some details of the history of their development. Beware of packages, however well presented, that have been published or disseminated without real trialling.
- 6 **Look at how the medium is used to enhance learning.** If the material does no more than to present on glass what could have been presented equally well on paper, it is probably not worth investigating further. The medium should do something that helps learning, such as causing people to engage in interaction that they may have skipped if the same tasks or questions were set in print.
- 7 **Try to watch a small group of target-group learners working with the package.** This gives you a better idea of how long you can expect people to need to spend with the package. More importantly, listening to the things learners say to each other gives you valuable clues about any further help or support that may be needed for future learners working through the same package on their own.
- 8 **Try to find out *what else* computer-based packages teach your people.** While the intended learning outcomes may be topic-specific, people using them often learn equally valuable skills relating to learning from computer-based materials in general.

- 9 **Try to measure your people's retention of their learning.** With computer-based materials, their achievements may be high immediately after their work with the package, but may fade quite rapidly afterwards. Even when they still have the opportunity to revisit a computer-based package for revision, they may not do so as readily as they would revise from paper-based resources or their own notes.
- 10 **Think about access to equipment and software.** It can be prohibitively expensive to give or loan each user both the software and the hardware needed. However, if the package is an important part of their overall training programme, ways need to be found to maximize their opportunity to work with it.
- 11 **Think how people will retain important ideas from the package after they have used it.** Make sure that there is supporting documentation or workbook materials, as these will help learners to summarize and remember the important things they gain while using computer-based packages. Where such resources don't already exist, you should consider the benefits of making a workbook or an interactive handout, so that learners working through the package write down things (or record them) at important stages in their learning.
- 12 **Check how long the package should take.** The time spent by people using a computer-based learning package should be reflected in the learning payoff they derive from it. Many computer-based learning packages come with indications of the expected timescales that are involved in using them, but it is well worth finding out how long typical learners actually take. Some computer-based packages can make this easier for you by logging the amount of time individuals spend working through them.
- 13 **Seek feedback.** Ask people using each package what aspects they found most valuable and most important. Ask them also what, if anything, went wrong in their own work with the package. Look in the feedback you obtain for anything that throws light on particular categories of learners finding difficulties with learning from the package (for example, speakers of other languages, gender-specific differences, or people who are uncomfortable with new technologies).

## Chapter 3 Individual Learning

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There seems to be so much focus on teamwork and collaboration these days, that it's easy to lose sight of the original and most important component of any organization: a person. What we find refreshing is an open and empowering approach to individual learning, which at its heart presupposes that the individual is mature, intelligent and can manage his or her own learning.

But, we might ask, what do people want to learn about? At the crux, we'd have to say it's learning how to do one's job better. That means learning the technical aspects of your job, but it also means learning about the people around you – how they work together; how they work with you. Our first set of tips explores this in greater detail.

As people dedicated towards creating learning organizations, we should really be asking individuals about how they learn. Ask yourself: how did I learn to become good at this? How do I know I'm good at it? Chances are, your answers will include such items as 'I watched someone do it' and 'I received helpful feedback'. Sophocles said, 'One must learn by doing the thing; though you think you know it, you have no certainty until you try'. How well do we understand how to help people to learn by doing? Our next two sets of tips look at just that, and how we can improve feedback.

How well do we know how to help people to learn the things that go wrong? Niels Bohr said, 'An expert is a man who has made all the mistakes which can be made in a very narrow field'. Do we really have any idea how to help people

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to learn from their mistakes, without blaming? How often do we ask people to think about what they're not good at? We have tips to help you to focus on just those questions.

Sometimes, people resist learning opportunities because they don't want to learn. Sometimes, they feel they don't need to. Either way, we have a set of tips to help them! We take the approach that a desire to learn exists in us all, but may be helped along by either tapping our intrinsic motivation or prodding a little bit with the things that extrinsically motivate us. The important part is to realize there's no one way for everyone.

Our last four sets of tips change the tone somewhat. We believe that sometimes there is simply stuff that gets in the way! So, we provide advice on how to help people to become more efficient, to manage their time better. We delve into how to plan personal time and projects, how to manage stress and how to cultivate the whole notion of wellness at work.

In other words, we look here at the individual person, but also the whole person. We hope by understanding the individual and fostering each person's potential, we can build a better organization.



# 19

## Learning how to do your job better

For most people, in most organizations, learning how to do your job better is the heart of the matter. Learning in an organization is about learning, deeply and profoundly, how to do a great job within that organization. The following tips can help you to do just that.

- 1 **Gain an understanding of the technical aspects of your job.** If you are a marketing director in a fast moving consumer goods firm, you need to be pretty good at briefing research agencies, writing marketing plans and making quick assessments of how promotional campaigns are unrolling. If you are a machinist in a textile factory, you have to be able to sew a straight seam.
- 2 **Gain an understanding of the dynamic interplays of people around you.** Technical skills alone work in a limited way without the dynamic interplays, which is why many brilliant technicians make lousy managers and why many successful managers spend more time networking and playing politics than they do managing *per se*.
- 3 **Pretend everyone in your organization is a doctor or a lawyer,** and obliged by dint of his or her profession to demonstrate professional updating. How would that apply for each individual? What is or should be each person's demonstrated continuing professional development? People can create continuous professional development plans themselves, with a little encouragement.
- 4 **Monitor continuous improvement.** Make the preparation and presentation of continuous professional updating plans and activities a part of the annual appraisal process.

- 5 **Encourage everyone to see their place in the organizational web.** Ask everyone to think of their job as being at the centre of a spider-web of people within and outside the organization. What are their most important and regular interfaces? What is good and bad about each of those? How could they be improved?
- 6 **Help everyone to collaborate on improving relationships.** Encourage people to form self-help groups to put together these spider-in-the-web analyses and try to address problems with relationships.
- 7 **Develop what Senge called 'Personal Mastery'.** Get to be the best person you know at something about your job. It can be a small part or a big part; something technical or something interpersonal, but be good enough at it so you can be proud of it.
- 8 **Look for one per cent improvements.** The Japanese philosophy of quality excellence was founded largely on 'Kaizen': small continuous improvement. Unless you work in a very inefficient firm or you are very new in a position, making big improvements is tough. But anyone, if they look hard enough, can make a one per cent improvement in their work and in their own performance. Set this as a goal each week and watch how it adds up.
- 9 **Be a teacher as well as a learner.** Give generously of your time to help others to learn your skills and knowledge. Most people find that the more they teach, the more they learn themselves.
- 10 **Look outside your organization for ideas.** Talking to our friends and colleagues is a great way to get ideas. Talking to our customers and suppliers might be even better. Talking to competitors, or people doing similar jobs in different industries, might be best of all, for it is there that unlikely, breakthrough ideas can come from.

# 20

## Helping people to learn-by-doing

‘One must learn by doing the thing; though you think you know it, you have no certainty until you try’, (Sophocles, 495-406 BC). A lot has been said (and written) about how human beings learn most effectively. Psychology is still a very young science! (See Hardingham, 1998.) Some of the theories and models are more easily related to practise than others. It is worth asking people in your organization about how they became good at something, and comparing their answers with the responses given below, and then following up the implications of people’s answers to these questions. This will help you to find out more about how to help people to learn effectively.

- 1 **Think of something that you know you do well. How did you become good at this?** Most people reply with words such as ‘lots of practice’, ‘I learnt this by doing it’, ‘I became good at this through trial and error’.
- 2 **Avoid pigeon-holing people into ‘learning styles’.** While there is much to be gained in alerting people to their preferred ways of learning, there is a serious danger that they end up feeling that they are trapped in the styles that they seem to have adopted for themselves. Human beings are very versatile animals, and can change their approaches to learning much more easily than is sometimes suggested.
- 3 **Cater for learning-by-doing.** This is sometimes called ‘experiential learning’. If you intend people to become skilled, competent or knowledgeable about something, by far the fastest and most efficient way is to get them having a go at whatever is involved.
- 4 **Reading is not necessarily doing!** Don’t assume that if you provide people with information (print-based or electronic) that they will automatically be able to learn from it, just by reading it. While reading may be a key

step, it is essential that they *do* things to apply and try out what they read every bit of the way along the learning curve, not just at the end of it.

- 5 **Listening is little to do with doing!** Lectures and training programmes often involve too much of trainees listening to experts. Knowledge and skills do not enter people's minds through their ears. A small amount of listening needs to be followed quickly by an episode of learning-by-doing.
- 6 **Make it possible for people to practice sufficiently.** Repetition counts a lot in learning by doing. Repetition helps people to build up speed, and this helps them to develop confidence. When someone has practiced something several times, they become more competent and proficient at doing it, and have to think less about how to go about it successfully.
- 7 **Make it OK to get things wrong at first.** Learning from one's mistakes is a healthy, natural and productive way of learning. The art of helping people to learn from their mistakes lies in setting the scene for them to make mistakes in a comfortable, blame-free environment. Design safe practice opportunities for people to learn.
- 8 **Choose learning resources which keep learning active.** Interactive open or flexible learning packages can give people the learning-by-doing practice that they need, whereas textbooks or manuals may merely provide them with the information that they need. Learning is about using and applying information, not just storing it up in one's memory.
- 9 **Make good use of the comfort of privacy in which to make mistakes.** Where people can have a go at something under conditions where no one else sees them get it wrong, they are better able to learn comfortably from mistakes. Learning resources that have self-assessment tasks and exercises make good use of this principle, and allow people to find out about their own mistakes in the comfort of privacy, and to avoid making them when other people would notice them.
- 10 **Think about the differences between training and teaching.** A good trainer gets trainees learning by doing, and facilitates their learning. Teachers tend to try to 'deliver' information, experience and wisdom, but there's not too much chance of it being received successfully. Turn your teachers into good trainers.

# 21

## Learning through feedback

Learning is a human process. Human beings are creatures with feelings. It is worth exploring how feelings affect learning. The following suggestions can help you to tease out the importance of the role of feedback in helping people who are learning to develop positive feelings about their progress.

- 1 **Ask people to identify something they *feel* good about.** This can be a positive attribute in their own make-up, or an aspect of their personality which they have a sense of pride in. It can also be something that they have learnt that they feel pride in. Don't embarrass them by asking them what it is, but instead then ask them the next question...
- 2 **Ask them what's the evidence that they have to support their positive feelings.** Most people are likely to reply along the following lines: 'other people's reactions', 'feedback from other people', 'seeing the results'. Point out the importance of feedback from other people in helping to develop positive feelings, and the consequent importance of feedback in successful learning.
- 3 **Get people in pairs to think of a compliment about each other.** Then get them to say it to each other. They are quite likely to laugh. Ask them why they did so. They are likely to use words such as 'I was embarrassed'. Point out that they have just done something which is likely to be directly contrary to their responses to question 2 above, and (in admittedly a pleasant way) that they have in effect rejected some positive feedback and devalued the potential benefit to them of the feedback.
- 4 **Suggest that people try giving each other a compliment, this time thanking each other for the feedback.** Help them to see that by accepting the feedback rather than shrugging it off as unimportant, they have opened the door to further positive feedback, and have used the feedback to improve their feelings about whatever might have been involved. Explain how the process of helping people to accept positive feedback can contribute strongly to effective learning.

- 5 **Ask people to think of some critical feedback about each other!** Then, if you dare, ask them to articulate this feedback, and to thank each other for it. Point out how this is the other side of the picture, and that critical feedback can also be very valuable in learning, but only if it is accepted graciously and *then* analysed and considered. Also point out the dangers of shrugging off useful feedback by adopting a defensive stance, and effectively closing the door to any further critical feedback being offered.
- 6 **Ask people to think of ways that they can deliberately seek out feedback.** Remind them that it may be up to them as individuals to open the doors both for positive and critical feedback, and that the more feedback they solicit, the greater they can make rational and constructive use of it. Draw out the connections between a climate or culture of free exchange of feedback, and cumulative effective learning, and that a learning organization is one where feedback is not only valued, but sought continuously.
- 7 **Ask people to work out from whom they can solicit useful feedback.** Show them that it is a two-way process, and that they should seek it not only from those in positions senior to them in the organization, but also from those whose work they manage or control.
- 8 **Ask people to reflect upon the various processes through which they can obtain feedback.** Help them to explore their own preferences for face-to-face feedback, written feedback, first-hand feedback and second-hand feedback.
- 9 **Get people thinking about how they can keep track of the feedback they receive and their follow-up actions.** Help them to realize that feedback is only really useful if they turn it into action and development. Suggest ways of keeping a record of both positive and critical feedback, and linking this to action planning and further evaluation of their actions.
- 10 **Help people to work out how they can keep track of the effects of feedback that they give to others.** It can be valuable to follow up positive feedback that they have given, to make sure that the recipients have really allowed themselves to grow from it and take it fully on board. Remind them that this is probably much more important and effective in promoting a learning organization than merely checking up on whether people have learnt from critical feedback.

# 22

## Learning from things that go wrong

‘An expert is a man who has made all the mistakes, which can be made, in a very narrow field’, (Niels Bohr, physicist, 1885-1962). Learning from trial and error is a perfectly valid way to learn. Learning from mistakes is how most people learn many important things. Obviously, it is important in a learning organization to protect people from any serious consequences of learning from their mistakes, but this is usually quite feasible to arrange. The following suggestions may help you to turn ‘mistakes’ into a valuable pathway towards being a learning organization.

- 1 **Ask people to think of something that they are *not* good at.** Ask them to explore *why* they think that they have not become good at whatever it is. Ask them to work out what might have gone wrong in their learning for such an element of their life. Then ask them to decide who might have been to blame for the situation, if indeed it was anyone’s fault.
- 2 **Help people to sort out any ‘self-blame’ aspects.** People are very likely to take the blame on themselves. They are quite likely to link their lack of success to personal deficiencies in their approaches to learning. Ask them to go a little further, and work out whether what went wrong can be tracked down to their *actions* (or the lack of particular actions) rather than to their personalities or natures. It usually can!
- 3 **Ask people to think further about someone else being to blame.** Ask them to move beyond blaming particular people, and to look instead at the *actions* that these people took (or did not take). Help them to see how much better it is to concentrate on analysing actions than to think negatively about personalities, and to distance their thoughts about what people *are* from their analysis of what people *do*. Remind them that it is much easier to cause changes in what people *do* than in what people *are*!

- 4 **Get people to think about the real value of learning from things that went wrong.** Ask them to work out whether their learning from mistakes may have turned out to be deeper and more enduring than their learning from successes.
- 5 **Prompt people to view things that go wrong as potentially valuable learning experiences.** Suggest that this can be a key value in a learning organization, and can help *all* experiences to deliver their maximum benefit to everyone concerned.
- 6 **Help to talk people out of the concept of blame.** While it can be useful to pin down the causes of things that go wrong to *actions* or to lack of actions, it is best to distance these actions from the people who were involved.
- 7 **Exploit the power of games and simulations.** These can provide safe circumstances for learning important skills through trial and error. It is worth designing particular simulations to provide people with the opportunity to practice their reactions to difficult real life circumstances, so that when they meet them for real, they are better able to tackle them confidently.
- 8 **Play with negative brainstorming.** Anticipate things that could go wrong, and get people in groups to brainstorm as many ways as they can think of, which could make them go wrong more badly, and more quickly. Often, doing the reverse may help to prevent things from going wrong in the first place, and the advance thinking may be useful when something is noticed that could lead to a problem.
- 9 **Capture things that actually go wrong.** Turn these into case studies with which to train other people, so that the lessons learnt from unfortunate happenings are translated more widely into the experience base in your organization.
- 10 **Advocate the value of unconditional positive regard for people.** Even when it may be necessary, in a learning organization, to be critical of people's actions, it remains possible (and highly desirable) to value and approve of people themselves. Use examples in your own experience about how well people respond to feeling valued, and how this can make fast and dramatic changes to their actions.



# 23

## Motivation, and wanting to learn

One indicator of a healthy learning organization is a general ethos where people *want* to learn. This is sometimes called ‘intrinsic motivation’, but the straightforward word *want* is more powerful. Incentives such as money or promotion can help people to want to learn, but this is really ‘extrinsic motivation’, and we believe that it is even better if the want to learn comes from inside people. The following suggestions may help your organization to fuel people’s want to learn.

- 1 **Get people thinking about ‘what’s in it for me to learn this?’** Learning requires time and energy, and it would be unreasonable to expect people to do it unless they can see some reason to make it worth their while.
- 2 **Ask people who are learning successfully why they keep at it.** You may be surprised by the rich diversity of motivations which fire different people. The more you find out about what keeps successfully motivated people learning, the more you can spread some of their motivators to other people.
- 3 **Get people to upgrade their reasons for learning.** Sometimes, people are learning out of a vague sense that they should be doing so. Help them to find more tangible reasons, so that when the learning becomes more difficult, they have something stronger to keep them going.
- 4 **Establish personal ownership for wanting to learn.** Different reasons for learning fire different people. It is best when everyone feels a sense of ownership over their own rationale for learning. Sometimes, the motivation may be closely associated with the mission of the organization, and of course this is fine. At other times, however, people may have quite unique or even strange reasons for learning, and as long as their reasons work for them this, too, is fine.

- 5 **Get people to work out their intended learning outcomes.** Help them to be specific and realistic. Help them to set sensible timescales for each learning outcome. Help them to structure their planned learning into manageable steps.
- 6 **Suggest to people that they make their intentions public!** Telling other people about one's planned learning outcomes can help us to achieve them – we prefer to be found to have lived up to our plans. It can be particularly useful to let colleagues, friends or family in on planned targets and deadlines – they can then offer a significant driving force.
- 7 **Channel people's motivation into learning-by-doing.** If people *want* to make sure that their learning is active, they are much less likely to fall into learning limbo, and will be watching the learning payoff that they are deriving from each part of their learning processes.
- 8 **Help people to want to learn from feedback.** Feedback is a vital process for successful learning, and it is worth getting people to develop a thirst for feedback, rather than just being content with using it when it happens to be received. People who are seeking out feedback are able to learn much more quickly by adjusting their approach continuously rather than occasionally.
- 9 **Encourage people to want to digest what they learn.** Making sense of complex ideas does not always happen easily, but when people are *trying* to make sense of them it is more likely to happen. Remind people, however, that some things take their own time to digest, and that it is often possible to be perfectly competent at doing something without yet being able to understand it.
- 10 **Get people to look back at their successful learning.** Help people to celebrate their successes. Help them to explore *how* their learning was successful, and to capture what they have learnt about their own approaches so that they can harness these to make their next episode of learning even more successful.

# 24

## Motivation, and needing to learn

There are times when with the best will in the world, it is hard to want to learn a particular thing! Then, some other kind of motivation may be needed. The following suggestions may assist you to help people to discover alternative driving forces for their learning.

- 1 **Ask people about what kept them going in the past.** Ask them to think of something they did really want to learn and did in fact learn successfully. Ask them ‘What kept you at it?’ Many of the same driving forces may continue to be available for future learning. The remainder of this set of tips is based on common driving forces.
- 2 **Necessity is the mother of much learning.** When people can see *why* it would be useful for them to learn something, it can help them to invest the time and energy that it will take. Try to get people thinking for themselves about how the learning in question will serve them well. When people have ownership of their need to learn something, they are much more likely to try to learn it.
- 3 **Get people to look to beyond their learning.** Learning can often provide a passport to opportunities that would otherwise be unavailable. Even when there may be no immediate intention to go for the opportunities, it is attractive to have the option.
- 4 **Strong, positive human support fuels learning.** When people have a lot of encouragement, they don’t usually want to let down their sponsors or backers.
- 5 **People like to be praised and celebrated.** Many a learner has kept going, when the going got tough, by thinking ahead to the moment of glory, when success would be celebrated, perhaps with them being presented with an award or a degree.

- 6 **Rewards work.** However, in a learning organization, it is important to choose rewards for successful learning carefully, so that *lack* of these rewards is not a significant disincentive to those who are not learning successfully, or who perhaps do not have equal opportunities to learn.
- 7 **People don't like to be beaten.** Sometimes, the wish not to be seen unable to do something is the powerful driving force that leads people towards success. In a learning organization, this factor of motivation should be used carefully.
- 8 **A personal desire to prove something to other people can fuel learning.** In a learning organization, it then becomes necessary to make sure that the other people are going to turn out to live up to the learner's expectations, and be duly impressed when required.
- 9 **A personal desire to prove something to oneself can fuel learning.** In a way, this is a 'need-based' rather than a 'want-based' scenario, but it can still be useful to encourage people to harness this driving force when it is appropriate.
- 10 **Strong, negative human support works, too!** However, there is little place for this in a healthy learning organization. It is worth thinking back to when learning has happened out of fear, or threats of the consequences that would accompany failure, and looking for more positive ways of using human support.

# 25

## Learning how to manage your time

Efficiency is something that *can* be learnt. Much can be learnt about this from people who seem to be naturally efficient. The old adage, 'If you want a job done well, give it to a busy person' is probably more about efficiency than may be obvious. The following suggestions may help you to become more efficient, and to help others to do so, too.

- 1 **Take care of the minutes.** Good time management is about looking after the minutes, and the hours take care of themselves. A surprising amount can be achieved in a few minutes, especially in terms of thinking. Thinking hard for a few minutes can often save hours, by helping to make actions and plans more effective.
- 2 **Be punctual.** Punctuality is a habit, and is quite infectious. If people know you will be on time, they tend to adjust their own timekeeping to match yours. Even if *you* are the only person on time, there's no tax on the thinking and planning you can do while waiting for other people. Don't regard this as an irritation, but as some bonus minutes that you can use for your own purposes.
- 3 **Be a time lord.** Most people let time control them, decide that you are going to manage time. We've all got equal opportunity when it comes to how many minutes there are in an hour, or a day or a week. Take charge of time.
- 4 **Make to-do lists.** It can be useful to make a weekly list, and to spend a few minutes each day selecting a daily list from this. Even better, make tomorrow's list towards the close of today. It only takes a word or two to jot down the key details of each task, and once on paper you don't have to worry any more about forgetting to include the task in your planning. Most task lists actually turn out to be far less daunting than the *thought* of their enormity!

- 5 **Divide your task list into four categories.** Some tasks are urgent and important. Others are important but not urgent. Yet others are urgent, but not really important. And the rest aren't urgent or important. You can probably afford to bin the last of these categories of task.
- 6 **Always start with one non-urgent but important task.** This is one of the secrets of good task management. The urgent *and* important tasks will get done anyway, and they won't be made much later by doing one non-urgent task first. This adds up to preventing that one important task from ever becoming urgent.
- 7 **Get started straightaway.** Whatever you're about to do, it's perfectly possible to put off the evil moment of getting started almost indefinitely! Thinking about doing something often takes nearly as much energy as actually getting on with it. Thinking about doing something may not have any tangible results. *Planning* is different of course, because real planning is doing something in its own right, not just thinking. Watch out for your starting avoidance strategies, and decide not to let them control you.
- 8 **Win at the 90-10 game.** Left to human nature, most things tend to get done in the last 10 per cent of the available time. This means that almost anything *could* be done just as well in the *first* 10 per cent of the available time. Think how much extra time this saves you, some of which you can use to make an even better job by adjusting and improving what you did in that first 10 per cent of the available time.
- 9 **Benefit from your distractions.** Turn them into reward systems. For example, use your video recorder to capture that favourite TV programme, and only allow yourself to watch it when you've earned it. This is much more satisfying than watching the live broadcast with a guilty conscience!
- 10 **Tell people about your targets.** The fact that you've told someone that you'll have finished so-and-so by such-and-such a time means that you don't want to be caught *not* having finished so-and-so on time. Get people to ask you whether you've kept to your schedule.

# 26

## Planning with a pen

It's only too easy to ponder and plan for ages without really making any progress. Whatever you're going to do, clear it from your head and get it on paper (or on your computer screen). The following suggestions can help people to keep their heads clear, and their pens busy!

- 1 **Always have a pen and paper with you.** You never know when inspiration will strike. You probably already know how frustrating it is when you can't manage to recall that bright idea that occurred to you. Don't clutter your brain with things that you're trying to store; get them down on paper where you can go back to them when you choose to.
- 2 **Don't write sentences, write words.** Ideas are about words rather than sentences. Sentences tend to constrain the ideas that might have been expressed in key words or phrases. Words, mind-maps, arrows, links are reflections of the higher levels of thinking.
- 3 **Use colours.** Try colour coding your words and ideas on paper. Sometimes you can use different colours at the instant of writing the words, but more often the colour coding is a follow-up process to thinking of the words. Coloured boxes round key words, or different colours of highlighting can be an efficient way to introduce codes of priority and sequence into your captured thoughts.
- 4 **Use post-its.** Even a very small piece of paper can capture the germ of an important plan. One advantage of post-its is that they are very moveable. Post-it planning ideas can be stuck to a window, a wall, a mirror, a 'fridge, a television screen, and so on. Plans that are out of sight may go out of mind; with post-its there are many opportunities to keep those plans in sight.

- 5 **Get early feedback on your plans.** Doing this helps you to be really receptive to feedback. If you wait until you've put a lot of yourself into your plans, you are more in danger of becoming defensive about them, and not really hearing other people's ideas properly.
- 6 **Put 'yes, but...' on hold.** It is much easier to criticize something, or say why it might not work in practice, than to think of bold, original ideas. Get as many ideas as possible before subjecting them to 'yes, but...'
- 7 **Put 'so what?' on hold.** This is a very important question, at the right time. If there's no good answer to 'so what?' a plan probably is not worth implementing. But give yourself time to prepare for the question. Sometimes you'll need to chew over an idea or action plan for quite a while before you know a really good answer to 'so what?' Don't abandon too early something that might turn out to be a good idea.
- 8 **Get over the blank sheet fright.** If you're sitting down to make your first stab at planning something really big, start writing on that sheet straightaway. For example, write the words 'very, very rough first plan!' The sheet is no longer blank, and the next bit is easier than it would have been.
- 9 **When brainstorming, go for quantity rather than quality.** There will be plenty of opportunity later to work out which ideas are the best ones. Going for quantity helps you to feel uninhibited about off-the-wall, crazy, original, creative ideas. Some of these may turn out to be the ones that make the important backbone of your final plan.
- 10 **Don't worry at first about getting things in the right order.** It can be useful to make a mind-map brainstorm of all your ideas in a spider-diagram or egg-diagram rather than making an attempt at a logical list. It is better to start with 50 possible ideas than just 10 considered ones. When you've got an abundance of ideas, it's much easier to sit back and decide which one to start with, which one to do next, and so on, and which one should be the final step in your plan.
- 11 **Keep your plans simple.** 'Everything should be made as simple as possible, but not simpler', (Albert Einstein, 1879-1955).



# 27

## Managing stress

The Health and Safety Executive in the UK defines stress as, 'The reaction that people have to excessive pressures or other types of demand placed upon them. It arises when they worry that perhaps they cannot cope'. The following suggestions may help you to control the levels of stress in your learning organization.

- 1 **Get better at recognizing the physical signs of stress.** These include raised heart rate, increased sweating, headaches, dizziness, blurred vision, aching neck and shoulders, skin rashes and lowered resistance to infection. When people are aware that such symptoms may be caused by stress, it helps them to look at their approaches to work to see if the causes may arise from stress.
- 2 **Get better at recognizing the behavioural effects of stress.** These include increased anxiety, irritability, increased consumption of tobacco or alcohol, sleep disturbance, lack of concentration and inability to deal calmly and efficiently with everyday tasks and situations.
- 3 **Increase awareness of how the human body reacts to stress.** Essentially this happens in three distinct stages. 'The alarm reaction stage' causes defences to be set up and increased release of adrenalin. 'The resistance stage' is when the body will resist the stressor, or adapt to the stress conditions. 'The exhaustion stage' results when attempts by the body to adapt have failed, and the body succumbs to the effects of stress.
- 4 **Think about the financial costs of stress.** It is estimated that stress costs more than the total cost of industrial disputes, and causes up to 40 million lost working days each year in the UK alone. The costs also include those associated with replacing workers suffering from stress.

- 5 **Get over the myths surrounding stress.** Research has shown that stress should not be regarded as being the same as nervous tension, and is not always a negative response, and that some people do indeed survive well and thrive on stress. In a learning organization, it is more important to manage stress than to try to eliminate it.
- 6 **Look to the environmental causes of stress.** These include working or living under extremes of temperature, excessive noise, unsuitable lighting, poor ventilation or air quality, poorly laid out work areas and even the presence of vibration. In a learning organization, finding out what people think of such environmental conditions is a good first step towards adjusting them.
- 7 **Look to the social causes of stress.** These can include insufficient social contact at work, sexual harassment, racial discrimination, ageism, inappropriate management approaches, unhealthy levels of competition and conflict between colleagues. Any or all of these, when present, can be discovered and identified by asking people about them.
- 8 **Look to the organizational causes of stress.** These include inappropriately heavy workloads, ineffective communication, excessive supervision or inadequate supervision, lack of relevant training provision, undue concern about promotion or reward systems and unsatisfactory role perceptions. Once identified, all of these causes can be remedied in a learning organization.
- 9 **Cultivate the right to feel stress and to talk about it.** Stress is at its worst when it is bottled up and unresolved. It should be regarded as perfectly natural for people's stress levels to vary in the normal course of their work. When stress is something that can be discussed, it is much more likely that the causes will be addressed.
- 10 **Develop an organizational strategy for managing stress.** An action plan should include research and recognition of the causes of stress, decision making processes for how to handle stress, identification of the key personnel best equipped and qualified to help people to manage stress and active review procedures for identified stressors.

# 28

## Cultivating wellness at work

Although the words ‘health and safety’ are often used together, much more time and effort is spent on securing safe working conditions than is directed to helping people to be healthy employees. This results in organizations prematurely losing their most valuable assets: their employees. The following suggestions may help you to move your learning organization towards a wellness one.

- 1 **Don’t underestimate the costs of ignoring wellness.** Costs to an organization include loss of productivity, increased absenteeism, poorer interpersonal relations, increased risk of accidents, increased insurance-related costs and the financial repercussions of early retirement.
- 2 **Plan to invest in wellness.** Take the following quote: ‘Ill health pension is now the majority way of retiring. 46 per cent of all retirements in England and Wales are on medical grounds’, (Sir Paul Condon, Commissioner, Metropolitan Police, 1997). Imagine what an effect on the health and vigour of a learning organization could be made instead of having to pay out that sort of money!
- 3 **Research the different health needs in different parts of the organization.** Health risks due to stress may affect some levels in an organization, while health consequences of smoking may be more widespread. Health effects due to diet may be quite different in geographically separated parts of a multi-site organization. Pinning down the locus of the health development needs is the first step towards targeting the needs effectively.
- 4 **Wellness is as much about how people *feel* as about how they *are*.** Cultivate an ethos where it is as legitimate and normal to ask, ‘How do you feel today?’ as to ask, ‘How are you today?’ When people get into the habit of being able to share and discuss their feelings, they are less likely to bottle them up when they are negative, and sharing positive feelings is always beneficial.

- 5 **Formulate a wellness policy.** An effective policy needs to be based on several factors. These include management commitment, for example, expressed through organizational policies. Employee involvement in the policy is essential, so that the ownership of the policy spreads throughout the organization. Health surveillance and monitoring is also essential, and needs to have ownership throughout the participating personnel of the organization.
- 6 **Don't expect to be able to calculate the direct savings that will be achieved by introducing a wellness policy.** There is abundant evidence for the savings that have actually been made through such policies, but it is too complex an issue to lend itself to doing a cost-benefit calculation in advance. An ethos of trust and high expectations are the best foundation for the development of organizational wellness, not a projected balance sheet!
- 7 **Bring wellness into organization communications.** For example, if the organization has a regular newsletter, this can be an ideal place to spread the word about wellness-related meetings or events. It can be useful to reproduce (with permission, of course) articles on health-related issues of particular interest to staff of the organization.
- 8 **Make good use of free help from outside the organization.** Although government funding for health-related education and training within your organization may be limited or even absent, there are likely to be other organizations, statutory or charitable, who could be willing to help without charge. In the UK, these could include the Health Education Authority, the British Heart Foundation, the Asthma Association, and so on.
- 9 **Don't set short-term expectations too high.** It takes time for wellness policies to bear fruits. It is, however, possible to make good use of short-term monitoring to find out statistics, such as how many people have given up smoking, whether the catering provision and/or demand within the organization has improved in a healthy direction, and the usage made of facilities or advice provision.
- 10 **Wellness and time management are closely related.** Time management needs to be well developed if people are to be able to accommodate additional health-related activities into already busy schedules. Link wellness training to time management development: they both contribute to stress-management, and the reduction of overall stress levels.

# Chapter 4 Collaborative Learning

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We hear much of collaborative learning, as if it's the most natural activity in the world. But it's the least, particularly amongst strangers. Sociological research tells us repeatedly that it is human nature not to be involved with people we don't know. We might make a mistake, or look stupid or be attacked.

We will, however, get involved with people we do know. We'll help them with their problems and even defend them. The key to working and learning with other people is, therefore, the ability to lower barriers and become friends with would-be strangers. That probably applies to most work-based team and learning groups. It's particularly important when we remember that most people in such groups may not only be relative strangers, but they often come from different parts of the organization that are competitive.

There are ways to reduce what sociologists call the 'bystander effect' and create a sense of group intimacy. Our first two sets of tips address how to do that.

We then look at how to set personal goals, which may or may not reflect shared goals. We offer advice on creating shared goals, which should bring the personal and group goals into alignment. Many of the problems arising both from 'time management' and group conflict arise from conflicting or inarticulate goals.

Our next set focuses on gender issues. This is an increasingly important area in today's workplace, and every facilitator needs to help groups to address it openly and constructively. This leads into the next set of tips which looks at establishing groundrules for effective collaborative learning. We look here at

how to help people to consider, articulate and agree the norms and behaviours that will guide them in their work together.

We need to recognize that however well we establish understanding and groundrules, there is still a strong likelihood that people will create problems for each other. Our next set of tips offers practical ideas for managing conflict. The emphasis is on openly managing conflict rather than avoiding it.

Finally, we consider what skills may be needed to help people to follow each other. We talk a great deal about leadership in organizations today – but who follows the leaders, and how do they do that? We assume here that leadership rotates, with the demand of the situation, or by agreement. That, therefore, means that while someone is leading, someone else is following. Rather than see followership as a weakness, or an abdication of leadership, we suggest in this last set of tips that it is a skill to be nurtured.

# 29

## Reducing the bystander effect

Sociologists describe the tendency not to intervene in the crises of others as the 'bystander effect'. The term refers to our hesitancy to help strangers in an emergency, believing that 'someone else' will do something, or that we are not suitably qualified to offer the right kind of help. This 'diffusion of responsibility' in a group setting is something that is likely to occur unless we take positive steps to generate involvement.

- 1 **Make friends quickly.** The bystander effect is prevalent amongst strangers, not friends or family. One of the ways to overcome it is to ensure that people working together in a group become friends rather than strangers as early in the process as possible.
- 2 **Create a skills portfolio.** People are more willing to help if they feel they are competent to do so. Share skills and knowledge in the group so that everyone feels they can contribute to each other and the group as a whole.
- 3 **Actively invite contributions.** The key facilitator or chair can deliberately withdraw and encourage others to come up with answers or ideas. The more often people can help, the more confident they will be about offering help.
- 4 **Promote small groups or learning circles.** Try to break a large group into fours or fives, where the sense of being a stranger is reduced and people are more likely to offer and take help. The smaller groups can reconvene as a large group with representatives from the small group synthesizing the discussion for the whole.
- 5 **Understand the nature of 'help'.** People can help by asking questions, by listening, by offering suggestions, by opening their networks, by lending books or articles. Group members should be encouraged to list as many manifestations of 'help' as possible.

- 6 **Encourage individual accountability.** In a meeting where someone needs help, everyone should feel obligated to assist. The above tips will encourage this behaviour, but eventually people will need to feel accountable for their action, or lack of it. The group can discuss this point and generate ideas for generating individual accountability.
- 7 **Encourage group accountability.** Organizational groups are not composed of individuals who operate in isolation. Most people in an organization are dependent on each other. The group can be encouraged to identify areas of common ground and see more clearly where everyone overlaps. This will minimize any sense of 'my' and 'your' business.
- 8 **Create a sense of crisis.** An inert state will continue until acted upon differently, to paraphrase Newton. Facilitators can encourage group members to see others' difficulties as not something that will simply be taken care of, but as something which is creating a real problem and will get worse unless someone intervenes.
- 9 **Identify ownership.** People need to put names and dates against offers of help. Encourage people to go beyond the lame 'call me if you need help' to a more specific offer of assistance: a time for the telephone call to take place, a date for a meeting, a name of someone who can give support, and so on.
- 10 **Review often.** Encourage people to reflect on how they have been acting as individuals and how their behaviour has or has not contributed to other people's learning.



# 30

## Creating group intimacy

Following on from the previous set of tips, the 'bystander effect', where people ignore the plights of others is a stranger phenomenon. People tend to help people they know, particularly their friends and family. To engender an atmosphere of creative collaboration, it becomes necessary to break down personal barriers and to create a sense of familiarity, even intimacy. The following tips will give you some insight as to how to do this.

- 1 **Agree that intimacy is a good idea.** Personal relations don't work when they're forced on someone. Individuals should be willing to share information about themselves or they will resent any attempts to become more personal. The group can decide if it would be easier, or at least more pleasant, to work among friends, or if some people want to maintain an arms-length relationship.
- 2 **Decide if arms-length is acceptable.** Some people may not desire a more personal working and learning relationship with others, which is, of course, their right. But, it's also the right of other people to say if they want to include the member in the group. If the group as a whole wants to work closely together, then it may be counter-productive to maintain a relationship with a 'passenger'.
- 3 **Review why intimacy is important.** Remember, there is no such thing as a good group or a bad group – there are only those that more effectively reach their goals. Most researchers agree that collaboration and cooperation is a critical success factor of team and group performance. That means the tendency to back away from strangers needs to be supplanted with a more friendly and approachable style.
- 4 **Agree to get to know one another.** We are more helpful with people we know, which may be a function of birth (family), or friends or neighbourhoods. What we want to do in an organizational group setting

is to accelerate the process of getting to know each other. We want to mimic the way that people learn about each other in order to deepen familiarity and create intimacy.

- 5 **Ask them how this happens.** Intimacy can't be imposed on people. The facilitator can ask people what it is about others that make them interesting, and list the items on a flipchart. What questions might we ask to get inside someone's personality and character? The responses will vary from the demographic (age), geographic (birthplace and residence since) to the prosaic – astrological sign, favourite foods, fears, funniest moments, hobbies, and so on.
- 6 **Let people ask each other.** Preferably in small groups, people can ask each other questions based on the list. Typically, people find the experience enjoyable and revealing, as much about themselves as each other. The small groups can synthesize their findings for the large group, and introduce each group's member in a more relaxed and inviting way than the usual 'introduce the person beside you' format.
- 7 **Create groups based on friendship.** People may prefer to group according to their original small groups described in the previous point – or, they might want to group according to the information they've discovered – foods, star signs, birth orders, hobbies or favourite movies. These shared interests or characteristics may be more meaningful to people than job descriptions or seniority.
- 8 **Make time for fun.** All the laudable work of the 'learning organization' is not necessarily achieved through sheer hard effort. Much of the success of any relationship arises from the fun and spontaneity that people engage in. This kind of fun enriches relationships and can help smooth the way for every other interaction.
- 9 **Stay with the moment.** Too much time in groups is spent abstracting a situation out of context. If someone has an idea, a question or needs help, the group should be encouraged to respond to that as it arises. People learn to trust others when their needs are met, not when others talk about them in theory.
- 10 **Celebrate success and failure.** Anyone can celebrate success, but often it's from making a mistake or failing to meet other people's expectations that we learn something valuable. Being able to share both the good luck and the bad luck stories with others helps us to trust them and feel close.

# 31

## Setting personal goals

The problem with most ‘time management’ approaches is that they focus on meetings, appointments and other parts of one’s schedule, rather than on personal priorities. What we want out of our lives and, in particular, our jobs, will greatly influence how we elect to spend our time. The following tips can help people to choose and articulate their goals.

- 1 **A goal can be both journey and destination.** In becoming goal-oriented, many people focus only on the end point rather than on the process. How we want to live and work is as important as where we want to be in five years’ time. Learning is often the process and can be an end, or a goal, in itself.
- 2 **Decide how goals will serve you.** Goals are self-created to fulfil a personal need. Ask yourself what that need is, and be as honest as possible. If your goal is to get a university degree, is that for a job, to impress your friends, to satisfy your mother or to give you a personal end-point to aim for? Being as clear as possible about your reasons for having a goal will help you to define it and plot your path towards it more effectively.
- 3 **Create process goals.** Consider not only your purpose in learning but the way you like to learn. That can be as broad as ‘with other people’ or as specific as ‘through auditory means’. Actively choose your processes and share your decisions with others. Your desired outcome is important, but so is the way you intend to achieve it.
- 4 **Be specific about your outcomes.** If you want to achieve your goal in terms of getting something or somewhere, be careful about how you express it. It’s easy to confuse inputs, process, outputs and outcomes. Your outcome is what you want to achieve – your output is some measure of how you are doing. For example, getting a great job as a lawyer may be your outcome; graduating with good marks from law school is an output.

- 5 **Change your inputs as necessary.** The ingredients you need to achieve your goal are highly variable and negotiable. Try not to confuse the ingredient with the outcome. For example, an input towards your law career may be paying a tuition fee, but this can take the form of cash, a loan, a scholarship or some other means. By becoming too focused on the detail of the input, we can blind ourselves to alternative means of reaching the desired outcome.
- 6 **Use mind-maps.** Avoid picturing your progression from here to there in a strictly linear sense. Sometimes the relationships between events is not a straight line. Mind-mapping helps us to see connections and convergence which may not appear as a hierarchy or in chronological order.
- 7 **Involve other people.** Goals are only abstractions; mental images that don't exist other than in our heads. Talking with other people, particularly your learning partners, about your goals will add a touch of immediacy and tangibility.
- 8 **Be open to change.** A goal isn't a target to aim for, where failure is perceived as not hitting it. Long-term, medium-term and even short-term goals are all subject to re-evaluation and change. If we don't do this, we are ignoring the ever changing stimulus of our environment.
- 9 **Stay tuned to where you are.** For some people, a goal becomes a faraway place they can dream about, while ignoring the day-to-day. If you are an ambitious person, you'll feel happier breaking long-term goals into short-term targets, which can be achieved on a daily basis.
- 10 **Monitor the match.** When personal goals are not aligned with corporate goals, work becomes more stressful and less productive. You may choose to forego personal goals in favour of corporate goals, or vice versa – but maintain awareness of what you are doing, and discuss with your learning partners.

# 32

## Setting shared goals

Any group initiative presumes a common reason, or goal, for the group's existence. This meta-goal may not be exactly the same as individual goals, but they should not be in conflict. How we go about setting goals will be determined partly by the dynamic of the group itself, but the following tips can offer general guidance.

- 1 **Define the group's purpose.** People join a group because it is better than working alone. That doesn't mean it is better all the time; indeed, certain activities may best be performed alone and then shared with a group. Writing a first draft, for example, is best performed alone. A group is helpful for sharing the completed first draft. Why does your group exist?
- 2 **Who are its members?** Can anyone join your group? Can they come and go? What about missing a meeting? The nature and behaviour of group members should be discussed at the first meeting.
- 3 **How do you want to be?** What are the desired group norms? Ask each other what kind of behaviour is expected, what it will look like and what the consequences are for not exhibiting it. For example, 'mutual respect' may be a goal, but what does it look like? Not interrupting each other or agreeing to offer constructive criticism may be 'respectful activities', which become group norms.
- 4 **What is likely to stop us from reaching that goal?** Each individual comes with his or her own personal history, likes, dislikes, fears and hopes. Forming a group doesn't cause those personal differences to vaporize! Groups should discuss and keep aware of individual differences and predilections, some of which may be counter to group processes and activities.

- 5 **Agree the nature of leadership.** Will the group's goals be managed by the group or will responsibility mostly be vested with one person? Leaders may come and go depending on the group's need or function, or the group may decide to appoint a leader. In the interest of collaborative learning, the leadership roles should be discussed and reviewed frequently.
- 6 **Who has what power?** Some people in the group may be perceived as more powerful due to, for example, position in the organization or their specialist knowledge. How will people's power help or hinder the group to achieve its purpose? Part of the group's statement of behaviour or norms should articulate the issue of how power is to be shared.
- 7 **How will goals be met?** Goals can be broken into shorter-term tasks with responsibility taken by individuals or by smaller sub-sets of the larger group. People can self-monitor progress, but should be encouraged to share progress with everyone else to truly facilitate group learning.
- 8 **Be aware of the group's life cycles.** A group grows in maturity, just as individuals do. People should share their views and experience of the group's growth, from the initial, exciting moments of 'birth' through the awkward middle period where frustrations may arise. The changing dynamics can be observed and the group encouraged to discuss and recommit.
- 9 **What will you do when you've 'arrived'?** Both the tasks and the processes can be tracked so that people know how the group is working and how its goals are being attained or not. And what happens when you 'get there'? Many groups decide to continue to work together well beyond the initial period when a task or a goal has been accomplished. This kind of group will decide that the process of learning together is a sufficient goal, although the process may be best served by again creating tasks or projects.
- 10 **Ending and evaluating.** If the group is at an end-point, evaluation of the process is usually helpful, both to create learning points for the future and also to give a feeling of completion. People should be able to define 'what worked and why' as well as 'what didn't work and why not'.

# 33

## Group learning: some gender issues

Getting people of opposite genders to work together effectively is a worthy aim of any learning organization. The best time to inculcate appropriate behaviours can be in group learning situations. When problems occur in groups due to gender issues, they can be felt more deeply than problems arising from almost any other cause. The following suggestions may help you to avoid some problems of this sort from arising in the first place, or to alert group members themselves to the potential problems, so that they can work round them in their own groupwork.

- 1 **Think about gender when forming groups in training workshops.** There are advantages and disadvantages for single sex groups, depending on the balance of the sexes, and other issues including culturally sensitive ones. In some cultures, females may be much happier, for religious reasons, working in single sex groups.
- 2 **Try to avoid gender domination of groups.** This can happen because of majority gender composition of groups. If this is inevitable because of the overall gender balance of the whole group, try to manage group composition so that minority participants don't feel isolated. Avoiding gender domination in learning situations can help people to carry over the principles into their everyday activities in the organization.
- 3 **Decide when single gender groups might be more appropriate.** For groupwork on gender-sensitive issues, such as gender imbalance in senior positions in the organization, or protocols for dealing with harassment, it can be best to set out to form single sex groups.
- 4 **Require appropriate behaviour.** For groupwork to be effective, all participants need to behave in a professional way, with standards that would be expected in an effective working environment. Outlawing sexist

or offensive behaviour in group learning situations can help people to refrain from such behaviours in their normal work in the organization.

- 5 **Decide when to ring the changes.** Use random group formation processes to form different kinds of groups for respective tasks and activities. This can show the advantages of changing the membership of a group (or working group, or committee, and so on) when problems surface. Also decide when to stick with existing group compositions. When a set of groups is working well, without any gender-related or other problems, don't just change the group composition without a good reason.
- 6 **Use group learning situations to set groundrules for talking and listening.** It can be useful to agree on groundrules that will ensure that all group participants (irrespective of gender) are heard, and not talked down by other participants. These groundrules can usefully extend to people's normal working processes in the organization.
- 7 **Avoid setting up excessive competition between male groups and female groups.** When there are gender-specific groups, don't egg a group of one gender on, by saying words to the effect, 'Come on, you can do better than them' referring to groups of the other gender. Competition is healthy when it's fun, but can be unhealthy when tainted by gender-sensitive agendas.
- 8 **Be sensitive about role assignment in group learning tasks.** For example, try to raise awareness about the dangers of tasks being allocated within groups on the basis of gender stereotypes, such as typing or making arrangements being handled by females, and 'heavy' work by males.
- 9 **Alert learning groups to be sensitive to leadership issues.** It is often the case that, for example, male members of groups may automatically see themselves as stronger contenders to lead the group than their female counterparts, and put themselves forward. When group members are aware that this is an issue, they are more likely to agree on a more democratic process for deciding who will lead an activity, or who will report back the outcomes.
- 10 **Be alert to the pros and cons of putting couples into the same learning group.** Couples can result in productive partnerships in groupwork, but can easily become exclusive or dominating if there is only one other person in the group. The same extends to the effect of couples in a work-related team or office. It is usually best for the couple members themselves if their roles are kept relatively independent in a learning organization.



- 11 **Avoid sexual preference oppression.** When it is known that group participants have different sexual preferences from the majority of the group, there is a tendency for them to be oppressed in one way or another by the rest of the group. It can be delicate to raise this issue in general organizational circumstances, and it may be best to respond to it as a facilitator in group learning workshops.

## 34

## Establishing groundrules for collaborative learning

Groundrules can be very useful indeed in collaborative learning contexts. Group learning activities can be a safe practice ground for working out and testing out groundrules. Group learning activities can sow the seeds for people extending the potential of groundrules to everyday contexts in their work in a learning organization. Below we have suggested a range of issues and starting-points from which practical, re-negotiable groundrules can be developed.

- 1 **Create ownership of the groundrules.** The various groundrules agendas suggested below should only be regarded as starting points for each group to adopt or adapt and prioritize. In a learning organization, groundrules are far more likely to work effectively if they have been designed and prioritized by the people affected by them, rather than imposed or imported from elsewhere.
- 2 **Don't put up with putting up!** Successful groupwork relies on honesty. It is as dishonest to 'put up with' something you don't agree about, or can't live with, as to speak untruthfully. The value of honesty as a groundrule can be learnt in collaborative learning situations, enabling people to extend it to their normal approaches to work in the organization.
- 3 **You don't have to like people to work with them.** In groupwork learning situations, as in professional life, people need to work with the team they are in, and matters of personal conflict need to be managed so they don't get in the way of the progress of the group as a whole. The adage, 'You can choose your friends, but you can't choose your relations' also applies to colleagues!
- 4 **Affirm collective responsibility.** Once issues have been aired, and group decisions have been made as fully as possible, a useful (if challenging) groundrule is that the convention of collective responsibility is applied,

where everyone lives with the group decisions, and refrains from articulating their own personal reservations outside the group.

- 5 **Use collaborative learning situations to help people to develop and practise listening skills.** There is no stigma attached to being 'hard of hearing', but many more people are afflicted with 'hardness of listening'! Every voice deserves to be heard, even if you don't initially agree with the point of view. Indeed, people often don't wait to find out whether they agree, before speaking out and muddying the water. It can be useful for group learning workshop facilitators to include some 'fun' listening exercises, to alert people to the dangers of hearing, but not listening.
- 6 **Participate fully in group learning environments.** Groupwork relies on multiple perspectives. Encourage people in collaborative learning situations not to hold back from putting forward their views, bearing in mind what we've already said about listening.
- 7 **Suggest that everyone takes a fair share of the work in collaborative tasks.** This does not mean that everyone has to replicate the same actions. It is best when the members of the group have agreed how the tasks will be allocated among members. Suggest that they keep tabs on everyone's level of contribution, and seek out ways of keeping this equitable.
- 8 **Get learning groups to explore 'working to strengths' issues.** There are times when this can benefit the productivity of the group. The work of the group can be achieved efficiently when tasks are allocated according to the experience and expertise of each member of the group. Don't always work to strengths, however! Activities in groups can be developmental in purpose, so task allocation may be an ideal opportunity to allow group members to build on areas of weakness or inexperience.
- 9 **Use collaborative learning situations to help people to learn to keep good records.** In any collaborative learning, there needs to be an output to look back upon. This can take the form of planning notes, minutes or other kinds of evidence of the progress of the work of the group. Rotate the responsibility for summing up the position of the group regarding the tasks in hand, and recording this.
- 10 **Use group learning environments to cultivate the ethos that group deadlines are sacrosanct.** The principle, 'You can let yourself down, but it's not OK to let the group down' underpins successful groupwork. It also underpins the ethos of any successful learning organization.

- 11 **Cultivate philanthropy.** Groupwork sometimes requires people to make personal needs and wishes subordinate to the goal of the group. In a learning organization, it is best when the ownership of this philanthropy rests firmly with the individuals who choose to make sacrifices, and where their philanthropy is recognized and even celebrated by people around them.
- 12 **Use collaborative learning situations to help people to value creativity and off-the-wall ideas.** Don't allow inspirations to be quelled out of a desire to keep the group on task, and aim to strike a fair balance between progress and creativity.
- 13 **Use collaborative learning situations to help people to regard groundrules as a continuing agenda.** It can be productive to review and renegotiate all groundrules from time to time, creating new ones as solutions to unanticipated problems that might have arisen. It is important, however, not to forget or abandon those groundrules which proved useful in practice, but which were not consciously applied.

# 35

## Conflict in groupwork

A learning organization is not an assembly of saints. Conflict of view and opinions is inevitable at times, and the quality of a learning organization is related to how individuals and teams address conflict, resolving it when this is possible, but also living with it when it can't be resolved. Much has been written about the stages that are quite normal in collaboration and groupwork. For example, it is common for groups to progress through stages of 'forming, storming, norming, and conforming' – not necessarily in one particular order! The following suggestions may help you to minimize the dangers associated with conflict in your organization, and to maximize the benefits that can be drawn from people who sometimes disagree.

- 1 **Legitimate conflict.** It is important to acknowledge that people don't have to agree all of the time, and to open up agreed processes by which areas of disagreement can be explored and resolved (or be agreed to remain areas of disagreement).
- 2 **Distinguish between collaboration and cooperation.** Collaboration can be difficult in circumstances where conflict is in the air, but cooperation can still be quite manageable.
- 3 **Establish the causes of conflict.** When conflict has broken out in a group, it is easy for the root causes to become subsumed by an escalation of feeling. It can be productive to backtrack to the exact instance which initiated the conflict, and to analyse it further.
- 4 **Encourage groups to put the conflict into written words.** Writing up the issues, problems, or areas of disagreement on a flipchart or marker-board can help to get them out of people's systems. Conflict feelings are often much stronger when the conflict is still bottled up, and has not yet been clearly expressed or acknowledged. When something is 'up on the wall', it often looks less daunting, and a person who felt strongly about it may

be more satisfied. The 'on the wall' issues can be returned to later when the group has had more time to think about them, or more wisdom about how best to tackle them.

- 5 **Establish the ownership of the conflict.** Who feels it? Who is being affected by it? Distinguish between individual issues, and ones that affect the whole group.
- 6 **Distinguish between people, actions and principles.** When unpacking the causes of conflict in a group situation, it is useful to focus on actions and principles. Try to resolve any actions that proved to cause conflict. Try to agree principles. If the conflict is caused by different opinions, it can help to accept people's entitlement to their opinions, and leave it open to people to reconsider their opinions if and when they feel ready to do so.
- 7 **Encourage a climate of unconditional positive regard.** This is easier to say than to do! However, if people try to maintain a healthy respect for each other as people, it is safer to explore deeply the differences of view that they may hold, and also safer to acknowledge differences that will not be bridged.
- 8 **Use conflict creatively.** It can be useful to use brainstorming to obtain a wider range of views, or a broader range of possible actions that can be considered by the group. Sometimes, the one or two strong views, which may have caused conflict in a group, look much more reasonable when the full range of possibilities is aired, and areas of agreement are found to be more abundant than they seemed to be.
- 9 **Capture the learning from conflict.** When conflict has occurred, it can be beneficial to ask everyone to decide on the constructive things they have learnt about themselves from the conflict, and to agree on principles that the whole group can apply to future activities to minimize the damage from similar causes of conflict arising again.
- 10 **Refuse to allow conflict to destroy groupwork.** You may wish sometimes to tell groups that achievement of consensus is an aim or a norm or, alternatively, you may wish to ask groups to establish only the extent of the consensus they achieve.

- 11 **Consider arbitration processes.** When conflict is absolutely unresolvable, the facilitator may need to set up a 'court of appeal' for desperate situations. The fact that such a process is available often helps groups to sort out their own problems without having to resort to it.
  
- 12 **Make it OK to escape.** When people know that they can get out of an impossible situation, they don't feel trapped, and in fact are more likely to work their own way out of the conflict. It can be useful to allow people to drop out of a group, and move into another one, but only as a last resort. Beware of the possible effects of someone who is seen as a conflict generator entering a group that has so far worked without conflict!

## 36

**'Followership' skills development**

Leadership is often discussed in the contexts of groupwork or organizational management, but it can be argued that 'followership' is even more important. In any learning organization, more people need to be followers than leaders, and for more of the time. The suggestions below may help you to ensure that your leaders have skilled followers! They may also help to optimize the learning that can be achieved through well-thought-out following.

- 1 **Brief groups about the importance of followership.** It can be important to legitimize followership as a vital factor to underpin the success of groupwork in a learning organization.
- 2 **Explain that followership should not be regarded as weakness.** When leadership is rotating between group members, they should regard their work when *not* leading as every bit as important as when they are directing the actions of the group. This paves the way towards wise decisions about when to lead and when to follow in everyday collaborative working.
- 3 **Accept that followership requires well-developed skills and attributes.** For example, patience may be needed. When it takes a little time for the purpose or wisdom of a leadership decision to become apparent, it is sometimes harder to wait for this to happen than to jump in and try to steer the group or argue with the decision.
- 4 **Celebrate skilled followership.** More followers than leaders are needed! It is virtually impossible to have a successful group where all members are adopting leading stances at the same time. Although the credit for successful groupwork is often attributed to the leader, it is often the followers who actually own the success. It is more than good sense to acknowledge this right from the start of any groupwork situation.



- 5 **Followership is a valuable, transferable key skill.** In all walks of life, people need to be followers at least for some of the time. It can be useful to employ groupwork situations to help people to develop skills that will make them good followers in other contexts of their lives and careers.
- 6 **Good followership is not the same as being 'easily led'.** Being 'easily led' usually is taken to imply that people are led into doing things against their better judgement. Good followership is closer to being easily led when the direction of the task in hand coincides quite closely to individuals' own judgement.
- 7 **Followership should not be blind obedience!** Encourage group members to think about how they are following, why they are following, for how long they are going to be content with following, and what they are learning through following.
- 8 **Suggest that group members experiment with a 'followership log'.** This could be private notes to themselves of their experiences of being led, but it is more important to make notes on their feelings as followers than to write down criticisms of the actions of the leaders. Whether the logs are treated as private or shared notes can be decided later by everyone involved in a group.
- 9 **Legitimize followership notes as authentic evidence of the operation of a group.** Such notes can tell their own stories regarding the relative contributions of members of the group, and the group processes that worked well, and those which worked badly. When it is known that followership records will count towards the evidence of achievement of a group, leadership itself is often done more sensitively and effectively.
- 10 **Followership is vital training for leadership.** We all know of skilled and able people who have been promoted to management responsibilities without good leadership skills. People who have been active, reflective followers can bring their experience of followership to bear on their future leadership activities. Having consciously reflected on their experience of following informs leadership approaches, and makes their own leadership easier for others to follow.
- 11 **Good followership is partly about refraining from nit-picking.** When people have too strong a desire to promote their individuality, it often manifests itself in the form of expending energy in trying to achieve unimportant, minor adjustments to the main processes going on in groupwork. Good followership involves adopting restraint about minor quibbles, and saving interventions for those occasions where it is important *not* to follow without question.

# Chapter 5      Systems for Learning

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We know that any system is a good example of ‘the best we know at the time’. Systems are captured learning: they make tangible that which we know now. That means they are inevitably out of date as soon as we create them. Whether we create systems for managing knowledge or systems for managing quality, they become ideal learning experiences, if we manage the experience.

So, first of all it’s a help to know what a system is. We can recognize a system primarily because it is an inter-related part of another system. A system isn’t a checklist of ‘10 ways to deliver quality service’ – it’s an interconnected part of other systems. That’s why we can’t divorce service quality from, say, competencies, or ISO 9000 or knowledge management.

Once we know what and where the system is, we need to create a picture, or a map, of it. This helps us to see how the system is really working, perhaps as opposed to how we designed it. All kinds of good and necessary changes to systems happen in practice. In the strategy field, we call this ‘emergent strategy’: it means we capture the everyday learning situations and embed this in our system.

Unfortunately, much of that learning will simply evaporate if it’s not managed. Your organization may have top-class customer service people, but what makes them tops? People who meet your customers and design solutions for them may seem to have almost an intuitive feel about how to do that. But, if it’s simply their personal intuition, they’ll never be able to replicate it or train others. That’s why their knowledge needs to be articulated and shared, until it becomes a part of the organization.

An excellent way to make that learning part of the organization is to create competencies, which translate that knowledge into behaviours. Many organizations who use competencies take the easy, but usually ineffective, shortcut of buying in a list of competencies from books or software. The only problem with this method is it isn't contextual. It would be a little like saying that a 'competent' stockbroker is one who explains every detail of a proposed investment plan at great length. That would only be seen as competent in a situation where the customer is relatively new – it would not be appropriate for a long-term customer who has been through such plans hundreds of times and now simply wants an overview and quick action.

A good way to achieve context is to involve the people who actually do the work. One such method is known as action learning. Its strength is the emphasis on real work, real time and real results. Asking people who work everyday with a problem to work out a solution is far more powerful than hiring an external expert who will never need to own the results.

What we learn from quality becomes part of our corporate learning experience – central to the concept and implementation of the learning organization. Whether we create formal structures to follow a well-accepted scheme, like ISO 9000 or Investors in People, is less important than how we learn from these structures.

Fortunately, more and more people are recognizing that all the money and paper involved in achieving these awards can be leveraged to create real learning throughout the organization. Key questions, like who are our customers and how do we serve them, are critical to these schemes. The questions and the answers need to be shared beyond the 'quality taskforce', so that the results become a living, dynamic part of the whole organization.

# 37

## Recognizing systems

Systems weren't invented by people looking at organizational behaviour, but thinking about systems has helped people both to understand and influence organizational behaviour. Probably the most popularized version of systems thinking was created by Peter Senge, author of the *Fifth Discipline*. The following tips are intended to summarize the idea of systems and show how the idea can be usefully applied to the learning organization.

- 1 **Systems are always part of other systems.** To recognize a system sometimes demands that we look at other systems around it. No system, by definition, exists independently. Always look for how a system exists as a sub-system of another system, and/or has its own sub-systems.
- 2 **How do systems integrate?** Analyse systems at their point of integration. As no system is independent, why isolate one and dissect it as if it exists alone? Don't look at the finance function separately, but only in terms of how it touches the sales function or the human resources function.
- 3 **Systems can grow organically.** Not all systems have been constructed from scratch, with a neat diagram depicting their roles. Don't just look for the formal or designed systems, but also recognize those that grew informally, organically and arose out of actual practices.
- 4 **Any system is captured learning.** Whether formal or informal, intended or serendipitous, a system represents the best we knew at the time. Systems that are now unhelpful were not necessarily so when they were first created. The more embedded in organization structure a system becomes, the harder it is to change as new and different organizational and customer needs arise.
- 5 **Systems have inputs.** Something has to enter the system in order to begin a process. The input may come in the form of people, time, money, raw materials, and so on. The important part to recognize is that the inputs themselves do not create anything, yet much of our time is spent focused on these – how much, how big, how long, etc.

- 6 **Inputs can help to create a transformation.** What we do with our inputs is the first step in creating something different. The process that ensues, be it a chemical reaction, the education of a student or a physical product to be marketed, is a result of not only our inputs, but our interaction with the inputs and their interaction with each other.
- 7 **Transformed inputs create outputs.** The result of our inputs and consequential interaction results in an output – one hopes the output we intended. This is what really counts. To manage the creation of desired outputs we need to learn about how to attain them by focusing on the whole system process – the bigger picture of the interaction amongst inputs, process and outputs.
- 8 **Systems transcend events.** Short-term thinking sees a series of events, with every event linked to an obvious cause. Systems thinking, on the other hand, tries to see events as part of a larger pattern. For example, as Peter Senge says, a drop in the stock market might be linked in the newspapers to lower than expected quarterly profit figures. But, this would ignore longer-term systems issues such as gradual global shifts from manufacturing to service-based economies.
- 9 **Systems have boundaries.** Although every system interacts with other systems, to improve a system you need to define its boundary. For example, a quality assurance problem may, indeed, be attributed to many other factors well outside the process, but we must be careful not to ignore the immediate need to account for what is happening in the system itself. A school's declining examination results may be a result of lack of funding or parental neglect, but they could also be directly attributed to a certain teacher's performance in the classroom.
- 10 **Recognizing today's system is difficult, as any system functions over time.** This is a result of delayed feedback, or inattention to feedback, which can mean that the system's effects and consequences are not clearly recognized as a 'snapshot'. An obvious example is the water temperature in a shower. When you've adjusted it, you have to wait for the adjustment to take effect.

Senge, P M, *The Fifth Discipline*, Doubleday, 1990

# 38

## Systems mapping

Understanding what a system is (see previous tips) allows us to look at how it performs. One technique is what we call ‘mapping’. Just as an explorer draws an outline of countries or rivers, so we explore systems through various methods of defining and drawing them. In particular, we like Peter Checkland’s soft systems methodology. The following tips offer insight into some useful mapping models.

- 1 **Remember, any model is an abstraction.** Before you model anything, remember that what you create will be an artificial picture of what actually happens. That means that we must be prepared to change, amend or, as it is sometimes put, ‘reframe our mental models’.
- 2 **Systems have customers.** Customers are those affected, well or badly, by the output of our systems. Starting with who the customers are, and what they expect, is a useful way to begin charting our system.
- 3 **Systems have participants.** Everyone involved in input, transformation and output is a system participant. Their actions and attitudes affect a system’s performance.
- 4 **Systems normally have a human interaction component.** The braking system on a car cannot, for practical purposes, be judged simply as a mechanical system divorced from human intervention. It will perform as a result, not only of its superb engineering, but also the reaction time of the driver. It must be engineered to facilitate effective human interaction.
- 5 **Systems have transformations.** A system always involves inputs, always involves something happening to those inputs – a transformation – and always involves an output as a result of the transformation. Transformations are often the defining component of systems.

- 6 **Systems have owners.** Those who can cause a system to continue or cease to exist are owners. Is the ownership in the system overt, or do people covertly own or influence the system?
- 7 **Systems work within a wider environment.** In understanding how a system works it is important to place it within its wider environmental context. The system of serving coffee in a hotel needs to be managed within its wider environment of hospitality and making guests feel at home – not just pure efficiency of coffee-serving.
- 8 **Systems are defined by the world-view of participants, customers and owners.** A national road system might be defined as, for example, a system for moving freight and people, a system for destroying the natural environment, a system for translating taxpayers' money into useful outputs or a system for wasting taxpayers' money. None of these definitions is wrong (or right) – they are a function of the world-view of those making the definitions. System definitions always need to be cast in this light.
- 9 **Systems do not have a life of their own, but exist through our permission.** Ask yourself who allows any given system to be, and why? In whose interests is the system? Why would one group of people defend it while another seeks its demise or change?
- 10 **Everyone's point of view will be critical to systems mapping.** Trying to map a system on your own is a little like defining your place in a relationship without consulting other parties. Other people's perspective must be brought into the picture, for it is only the complete, whole or bigger picture that counts here. Any one view will be incomplete.

# 39

## Knowledge management

Knowledge management starts with the premise that an organization has ‘intellectual capital’, which can be used to create competitive advantage. If intellectual capital consists of knowledge, then our question becomes: how do we develop, maintain and distribute it? The following tips may help you to do it.

- 1 **Start by defining what knowledge and information means to your organization.** This may include obvious answers such as ‘proprietary processes’ or ‘product excellence through research and development’, but it should also include critical pieces of information about customers, competitors, stakeholders, and so on.
- 2 **Focus on working knowledge, not knowledge workers.** The concept of ‘knowledge worker’ refers to an apparent minority of employees who exist mainly as professionals. But knowledge exists at every level in the organization and in all types of organization – agrarian, industrial and service. As no one has yet satisfactorily defined knowledge worker, concentrate on the people in your organization who know things. And, yes, that will probably include just about everyone.
- 3 **Map your information flows and repositories.** Mapping is common practice in logistics and business process re-engineering. In this case you’re not mapping process flows, but knowledge flows and storage. Who has the knowledge defined in point 1? What do they do with it? Who has access to it? How is that knowledge captured? Can it be replicated?
- 4 **Measure the value of your knowledge.** It doesn’t matter how you do this, since no one agrees on a single best method. Good starting points would be to evaluate the worth of knowledge relative to your organization’s markets, strengths and future. What you want to discover is how important these pieces of existing knowledge are.



- 5 **Identify your knowledge gaps.** The previous exercise will help you to identify the knowledge that is missing. If, for example, part of your longterm strategy is to enter foreign markets, but you have no experience in doing so, you will need to organically develop it, buy it or align with someone else who has it.
- 6 **Audit your competitors.** How smart are the people you compete with? Take a look at other organizations, not to create a profile of 'best-practice', but to ascertain what they are doing that reflects how much they know. Perhaps you know more and can capitalize on it – or less, and will need to either gain that knowledge or change your point of differentiation.
- 7 **Audit everybody!** Take your supply chain and analyse knowledge ownership, development and distribution amongst its members, from purchasing through to delivery to the customer and after. How are your supply chain partners managing the flow of knowledge, as well as information and materials? Is this part of their contract with you – and, if not, why not?
- 8 **No one knows the answer.** Because there is no one, known solution to the problem, it follows that nobody will be an expert with the answer. Resources may be drawn upon to broaden knowledge or understanding, but only the participants who own the problem will come up with the best solution.
- 9 **Create knowledge plans.** Based on your analysis of the previous points, you will need to develop a strategy in response. These plans should be created and owned by the people most affected by the outcome – the workers. Their participation is critical to a learning organization's development, or the exercise will be yet another foray into 'strategy-by-management-consultant'.
- 10 **Take action.** Knowledge isn't created or shared by thinking about it, but by auditing its existence, identifying gaps, making plans and taking action. Action might mean registering patents, embedding knowledge into quality assurance systems, licensing your product or service to others, investing in new research and development, creating strategic alliances, divesting, investing ...
- 11 **Make yourselves famous.** Knowledge in the form of intellectual capital is a powerful point of differentiation. How many people know how smart you are? Encourage people to make presentations, inside and outside the organization, and write papers for publication. During the process, they'll learn even more.

- 12 **Do it again and again.** Any system is only captured knowledge of the best we know at the time. As knowledge increases and is shared, it needs to influence the rest of the organization. Be consistent in re-evaluating and revisiting the above points until continuous knowledge creation and dispersion is an everyday event.

# 40

## Using competencies

The idea of competencies has been around for some time, meeting with varying degrees of enthusiasm. Proponents say that it helps an organization to be more clear about what is needed for work and how it should be rewarded; opponents argue that the approach produces identikit managers. A learning organization can combine effectively both points of view if a competence approach is sought. The following tips can help to achieve a balance.

- 1 **Be clear about why competencies are desired.** Some organizations want to specify competencies in order to help the recruitment and training process; others want to clarify their reward and incentive schemes by tying them to competencies; others may simply see competencies as a useful method of helping people to articulate what attributes of certain jobs are desirable.
- 2 **Define what you mean by competence.** Various definitions abound, but commonly a competence is a combination of skills, knowledge and values best expressed as observable behaviour. Competencies are often expressed as 'can do...' statements. They could be better expressed as 'does do...' statements! Make sure people in your organization share an idea about what competence is.
- 3 **Don't benchmark against other organizations.** The practice of benchmarking is anathema to a learning organization. What works for one company will not necessarily work for any other. The competencies required in one organization will be different from any other. Accept your organization is unique.
- 4 **Avoid a programmed approach.** There are tool-kits plus other ready-made competence solutions available. These do not, however, reflect the needs and skills of your organization. Using someone else's list of competencies further complicates the issue by alienating people. No one wants a list imposed on them.

- 5 **Start with the strategic issues.** What are the issues facing your organization that will demand a response now and in the foreseeable future? What are the actions that are needed? What 'can do...' skills will best help to take these actions?
- 6 **Create a forum and venue for the discussion.** The questions regarding strategic issues and needs should be debated at all levels in the organization in order to capture emerging learning and strategies.
- 7 **Have people consider what competencies are needed to respond to the issue.** What skills, knowledge and values will you need to respond to them best? Will these vary at different levels in the organization?
- 8 **Express competencies in behavioural terms.** To fairly evaluate whether someone has a certain competence, it will need to be observed. Encourage people to state the desired competence in words that describe activities. For example, it is more helpful to say, 'Can lead a team in strategic planning process' rather than 'understands strategic planning'.
- 9 **Evaluate competencies for everyone, by everyone.** Creating an appraisal process that allows feedback will give everyone a chance to contribute to competence-building on an ongoing basis.
- 10 **Re-examine competencies in the context of changing issues.** What is necessary today may be redundant tomorrow. Your organization changes, and so will the competencies required to move it along.

# 41

## Action learning

Action learning, first proposed and practised in the 1940s by Reg Revans, is not to be confused with ‘learning by doing’. Action learning is a disciplined approach based on the theory that a group of people sharing similar concerns can work together to resolve real problems or issues, bringing additional resources or knowledge as necessary. The following tips summarize the theory and practice of action learning.

- 1 **Action learning focuses on problems, not puzzles.** There are known answers to some questions we may have, such as ‘how does the software work?’ that can be easily answered. Action learning concerns itself with what is not known, and what will never be exactly black or white – such as, ‘which markets should we serve?’
- 2 **No one knows the answer.** Because there is no one, known solution to the problem, it follows that nobody will be an expert with the answer. Resources may be drawn upon to broaden knowledge or understanding, but only the participants who own the problem will come up with the best solution.
- 3 **Action is always part of the solution.** Action learning problems do not conclude with recommendations for other people. The process of action learning demands accountability and ownership on the part of those resolving the problem. Implementation of the solution becomes the challenge.
- 4 **A group of interested people works together.** Action learning presumes that learning and action occur most effectively in a social situation. The group exists to help members to question and resolve issues. Members also act as resources for each other, providing specialist knowledge, experience and introduction to networks.

- 5 **The group is guided by an experienced advisor.** Action learning groups work with an advisor who is experienced in group dynamics and action learning. The advisor's role is to help people to act more effectively as a group, understand group processes and eventually become self-managed.
- 6 **Processes are always transparent.** Action learning participants and advisors do not protect personal learning technology. Unlike a conventional programme, where trainers have methods and answers, the process on an action learning programme is always overt, discussed and co-created with participants.
- 7 **Games and simulations are usually anathema to action learners.** Rarely would any artificial or imaginary situation be invented for an action learning programme. Such interventions are not grounded in the participant's reality and come with ready-made solutions.
- 8 **Self-or organizational development is a by-product of action learning.** Learning on an action learning programme begins with a problem. Working that through in a group will often create solutions and also develop the participant – but development for its own sake is not the starting point.
- 9 **L=P+Q.** Learning equals programmed (or known) knowledge plus questioning. Action learners do well to review existing knowledge before seeing if it will fit their problem – rather than 'reinvent the wheel'.
- 10 **Change is embraced.** Action learners do not accept the conventional wisdom that people resist change. They understand that people sometimes, reasonably, resist the losses or problems that can occur through change, but that change itself is inevitable, dynamic and invariably interesting. Implementation of the solutions to their problems demands changes.

# 42

## Learning about quality

If there is one word which has transformed the way businesses interact with customers in recent years, it is 'quality'. As customers we have learnt to expect quality and reliability, and as service and product providers, we have learnt that we can deliver. Learning about quality is an inescapable part of organizational learning.

- 1 **Stick with reality.** Help people to learn about improving quality by turning them loose on some tough problems that need action. People learn best by doing. Outdoor development activities like climbing cliffs might teach people how to climb cliffs, but improving the organization's products or services is the number one way to learn about quality improvement.
- 2 **Design is 90 per cent of the success of a quality improvement intervention.** Put most of your effort into designing your programme for improving quality; worry about how to deliver it later. A good showman will do a good show for you: if you want a good show, go and see David Copperfield make an elephant disappear before your eyes. Otherwise, invest in some solid design.
- 3 **Total quality should be based on a total systems picture.** Learning about quality means learning how to do the whole thing right, not just bits of it.
- 4 **Quality counts everywhere.** Work with people at requisite levels. Learning to do what you do right now a bit better pays massive dividends. Help your engineers to learn how to be better engineers and worry about helping them to learn how to be corporate strategists another day.
- 5 **Don't teach teamwork by teaching teamwork.** Help people to get used to solving problems in teams. Teamwork is a great by-product. A team-working workshop might be lots of fun, but chances are that it won't do much for your team.

- 6 **Recycle your learners.** People who have been through an initiative on learning about quality will be great assets for the next wave. Make sure you develop people as coaches and mentors for others. Teaching is a great way to learn!
- 7 **Use your internal resources whenever possible.** Don't subcontract everything. If you are helping your people understand project finance, for example, think about using your finance director to give input, rather than automatically contracting an unconnected outsider.
- 8 **Politics is the larger part of effectiveness in organizations.** If technical skill was all we needed to improve quality, we would all work for zero-defect firms. Help people to think through implementation issues in terms of politics, networks and interfaces.
- 9 **Persist.** You don't change an organization's culture with a snap of the fingers. You do help it to change by finding leverage points and pushing them.



# 43

## ISO 9000 and the learning organization

Being a learning organization means being able to use existing systems such as ISO 9000 effectively – not bypassing them. The following tips give some ideas on how to bring some of the disciplines of an ISO 9000 quality assurance system to the learning organization. Clause numbers relate to the ISO 9002 standard.

- 1 **Management responsibility (clause 1).** A learning organization needs a policy that includes both intent and evidence that the intent will be managed towards fruition. Who does what needs to be set out – organization and responsibilities. Resources need to be allocated, and review and audit cycles devised.
- 2 **System procedure (clause 2).** Describe what reference material will need to be created, if any, and in what form (paper, electronic).
- 3 **Contract review (clause 3).** Requirements and expectations for learning need to be set out and preferably signed.
- 4 **Design control (clause 4).** Describe how new initiatives are brought into play. Make clear who is expected to initiate, approve, review, sign off; when and how; how is it recorded. Clarify what criteria are used in designing new initiatives, and how we know these criteria have been used.
- 5 **Document control (clause 5).** Decide what records need to be kept and in what form. At the very least, this needs a filing and retrieval system. Also decide who has access to records, and how procedures are updated (and how you know, in the case of an update, that the new version not the old one is being used).

- 6 **Purchasing (clause 6).** Set down what are the main criteria for contract supplier selection (for example, of consultants, facilitators and the like). These might include lowest price, experience, timeliness, to name just three. Note how to measure and compare. Set out the procedure for managing sub-contractors. Does it need to be the same in all cases?
- 7 **Process control (clause 9).** Decide whether you need specifications for safety, equipment usage, detailed specifications on how to go about a task; and how people will get to know about them. Detail any special out-of-the-ordinary processes, if any, and what to do with them.
- 8 **Internal audit (clause 17).** Make sure your systems are designed with audit in mind, to be simple and transparent, with records easy to find and examine. Decide when audits of your activities should take place and who should do them, and what normally should happen as a result.
- 9 **Training requirements (clause 18).** Write down what you perceive specific training requirements to be, if any, in skills, equipment use, knowledge, safety, and so on. Record who should be trained, who and how it is to be done and how it is recorded.
- 10 **When you've done all that – do it all again.** Good quality assurance systems are designed to be dynamic, living things, not static, unchanging ones. A good system – and an ISO 9000 system is no exception – should change and grow as your organization, its people and its environment changes and grows.

# 44

## Investing in People in the learning organization

Investors in People, or IiP, is a standard developed by the British Government's Department of Employment to encourage organizations to make conscious investment in their staff. It is based on policies practised by leading UK companies. Organizations addressing learning needs can do so in line with the IiP guidelines.

- 1 **Go public.** Make a public commitment from the top to develop, to their potential, all employees to achieve their business objectives. This can be in the form of an address to staff by top management, a news release to local and trade press, or an article in an internal newsletter. Whatever the medium, make it clear and unambiguous.
- 2 **Include everyone.** Create a plan which includes regular reviews of the training and development needs of all employees.
- 3 **Raise awareness of the organization's goals.** Make an effort to make all staff aware of the broad business and other aims of the organization. Again, this can be addressed through a variety of media.
- 4 **Set widely-publicized targets and standards for development.** What gets measured, as they say, gets managed. Set some input, output and outcome measures for development. What do you expect the inputs to be? What do you expect the level of investment to be? What do you expect to be different as a result of them?
- 5 **Think individual.** On an individual basis, work through how each person contributes to the success of the organization.

- 6 **Cost-benefit people as well as plant and products.** Demonstrate that you understand the costs and benefits of developing people, in the same way that you understand the costs and benefits of investing in plant and equipment or in financial markets.
- 7 **Demonstrate that you are developing staff in line with the organization's business objectives.** Everyone should be aware of key success factors for the organization and how any development activities reinforce and contribute to them.
- 8 **Encourage staff to take the initiative in suggesting their own training and development needs.** Give them guidance on how these needs can relate closely to the needs of the business. Demonstrate active support in meeting needs identified.
- 9 **Demonstrate that you are competent to carry out your responsibility for developing people.** Don't outsource all your people development needs – grow your own expertise. Every manager and supervisor should also be a coach and a mentor. These are inescapably management jobs in today's world, and to carry them out they need to be trained and developed, too.
- 10 **Turn values into action.** Make sure that your statements on what the organizational values are translated into active development of capability, individually and organizationally, to deliver them.

## Chapter 6 How to Build a Centre of Learning in Your Organization

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Why not be your own university? The developed learning organization recognizes itself as a centre of learning. Why send people away to learn about their own organization? Increasingly, organizations are bringing the methods and skills of learning centres into their buildings. In this chapter, we suggest how to go about it.

Firstly, our advice is to 'act small'. A small company, with less than 10 people in it, can be thought of as a 'natural' learning organization. It responds to its market quickly; maintaining long-term relationships with its customers and is intrinsically dynamic. But what if you're bigger than 10 people? Our advice here is to fake it. Just 'act small'. These tips show you how to replicate the structure and behaviour of smaller, nimbler organizations. Break up big structures, for example. Keep people excited about creativity and customers by keeping them away from big corporate structures.

Next, we move on to considering what the syllabus or curriculum for a learning organization might be. We explore here the scope, sequence and content of what is to be learnt. This helps us to prioritize our efforts and investment to discover what we need to become competent at so as to survive and thrive in the future. Because that challenges us to think about the present and the future, this set of tips is divided into the future and the present.

A good starting point is to create a shared sense of strengths and opportunities, and then to work out how to capitalize on your strengths and exploit your opportunities. The first five tips concentrate on how to do that. At

our halfway point we move into the future and urge you to ask the right questions. Questions drive the curriculum. Our tips here will help you and others to learn the art of asking questions, not jumping to conclusions or ready-made solutions.

And, who will be your learning advisors in your learning centre? Everyone! Our next set of tips shows how any person in the organization can (and must!) be coached into facilitator roles to guarantee that learning is shared and enriched.

Most universities carry out research – and so will your learning centre. After all, how do university professors know so much? They read, they teach and they ask other people what they're doing. This set of tips shows you how to do that. Anyone hoping to keep up to date and professionally developed needs to practise these everyday skills.

Universities also have professors – and so do you. They're your own resident experts – your own managers and colleagues. Senior managers have a specific role to develop those around them. In a learning organization, they are your professors. So, we suggest you write professorial responsibilities into job description and recruitment advertising.

All that learning needs to be captured and downloaded. The rest of our tips focus on how your managers can share, facilitate and capture learning throughout the organization.

Lastly, we look at how to see if it's all worthwhile, and how to reward people for making it so. Learning is a journey, as people say, not a destination. We consider here how to make it fun and exciting. Our first three tips offer three Cs. Celebrate – often. Get into the certification business (people love to display certificates and awards – it makes them rightly proud of their achievements). Credentialize – offer your own in-house programmes and credentials.

When you evaluate a programme, do so on the basis of results and achievement. Forget the 'smile sheets' that merely say whether people liked a training day or not. (But then, you're not still doing 'training days' are you?) Encourage people to set their own achievement measures and rewards.

We're concluding here that people in your learning organization will know by now what's important, what isn't and what they intend to do about it. We hope that it makes their working lives more fun, more productive and ultimately more rewarding for everyone.

# 45

## Act small

A small company, with less than 10 people in it, can be thought of as a 'natural' learning organization. The very small firm responds to its market very quickly; stays ahead of the game; forges relationships with its customers; is naturally fluid and fast-moving. If there is a mailshot to be sent or a rush order to be packed – everyone works on it. If there is a celebration to be had – everyone celebrates. If there is a death in the 'family' – everyone weeps. Here are some ways bigger organizations can behave like smaller ones.

- 1 **Keep things moving.** Encourage people to work on projects, perform different roles, take leaves of absence. Bring new people in, however you can and whenever you can, even if only for short periods as part-time or work-experience staff. Replenish your corporate 'gene pool'.
- 2 **Look for the unexpected.** Let your advertising people loose on an accounting problem, or take your administration manager on a sales call. See what happens. What's the worst it could be?
- 3 **Create power by sharing power.** Small businesses naturally empower their people. If capital – both financial and intellectual – is shared, it grows. If it's hoarded, it tends to die.
- 4 **Keep fixed costs down.** If there's a way to contract it, rent it, borrow or barter it – do it. Fixed costs and obligations kill ideas and adaptation.
- 5 **Make plans and budgets dynamic.** A micro-business may have an annual plan it presents to the bank, but if it tried to stick rigidly to it, it would more than likely be out of business within the first quarter. Roll with the changes.
- 6 **Break up big structures.** Small firms usually behave like small firms when they are small. If you don't know all the names of all the spouses and children of all your staff – you have too many staff. Break them up into smaller structures.

- 7 **Encourage initiative.** The next time someone comes to you with a complaint – put them in charge of a project team to get it fixed. The next time you hear ‘someone should do something about this’ – say two words – ‘You’re it!’. Anyone can be an internal change-master with a little encouragement.
- 8 **Cut your meetings by half, then by half again.** Entrepreneurs hate meetings. Meetings are what you have on a plane or over a sandwich or in a car. Entrepreneurs use their time to make and sell things.
- 9 **Think of your head office as a banker.** Entrepreneurs borrow from their banks – they don’t work for them. If people are excited about creativity and staying close to customers, the last thing they’ll want to do is climb into corporate bureaucracy.
- 10 **Stay excited.** Enthusiasm is contagious. Successful entrepreneurs are passionate about what they do. Take time or whatever else it takes to stay fresh.



# 46

## What is the curriculum for an organization's learning centre?

A curriculum is the scope, sequence and content of what is to be learnt. In a learning organization, setting a curriculum is our way of prioritizing our efforts and investment. A sensible way to think about this is to address what Prahalad and Hamel called 'anticipatory competences'. These are what we need to become competent at in order to survive and thrive in the future. We also need to think about what we need just for now. The following tips are divided into the future and the present.

### The future

- 1 **Create a shared sense of your strengths and opportunities.** This is a good starting point to judge where your learning priorities need to be. Don't be confused by the traditional SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis – the weaknesses and threats are meaningless. Simply capitalize on your strengths and exploit your opportunities.
- 2 **Strengths are those things that you have, whether or not you use them.** A strength can be from many areas, such as the knowledge of your people, a proprietary process or technology, a location, a customer base, a supplier relationship, and so on. Many strengths may be hidden or taken for granted.
- 3 **Develop plans for capitalizing on your strengths.** This may mean developing new levels of competence to build on those that currently exist. It may also mean learning how to communicate those hidden strengths to existing and potential customers. New markets may need to be opened – people will need to learn how to do that.
- 4 **Once you know what your strengths are, examine your opportunities.** Look at your products, markets, your competitors, your customers, and

so on. Sony, for example, takes its products and looks at product improvement, product accessories and the bright ideas which are generated from looking at the product.

- 5 **Create strategies to develop your opportunities.** These usually amount to one of three directions: buy, grow or joint venture. Each if these will generate learning needs for the organization. Buying strengths, for example, involves skills of negotiation, change management and culture management; growing strengths would mean developing new skills and changing old habits; joint venturing requires negotiating and partnering skills.

## The present

- 6 **Questions drive the curriculum.** Learn the art of asking questions, not delivering answers. More so, encourage others to ask questions, not search for ready-made solutions. The best questions won't be answered by yes or no, but are phrased openly to encourage information sharing.
- 7 **Ask everyone.** Develop the art of a 360 degree orientation. Too often, we only ask our 'bosses' what they expect from us, and forget to ask the same question of our colleagues, the people who report to us, our customers, our suppliers, and so on. Their answers can help us to create and prioritize our own learning agenda.
- 8 **Decide who owns the curriculum.** The poorest solution would be to vest it simply in the human resources department, as if learning is their business and no one else's. The HR professional is an invaluable resource in helping to design and deliver learning events, but the sense of ownership ideally is shared throughout the organization. Learning, therefore, becomes everyone's business, everyone's opportunity and everyone's responsibility.
- 9 **Always translate the broadest to the most narrow.** Whatever learning agenda or curriculum becomes important at the broadest, strategic level must be translated into deliverable activities throughout. After all, if everyone isn't showing up every day to learn and to act on their learning, what are they doing there?
- 10 **The curriculum is dynamic.** Once a learning agenda is set, it becomes out of date. By definition, as one learns something another question is inevitably presented. Capture emerging questions so that they become part of a continuous learning pattern.

# 47

## Developing your learning advisors

In the learning organization, everyone is a learner and everyone is a teacher, too.

- 1 **Include everyone.** Knowledge workers are the key to success. That means that everyone in the organization needs to be both a specialist (in the area in which they work) and a generalist. There is a famous story about a Toyota factory in Japan where a cleaner was asked what role he performed. He said that he kept the work area clean to make it easier for the assembly staff to put together high-quality cars. Everyone is a learner.
- 2 **Use your own staff.** Organizational learning and growth is a process which requires constant work and attention, which means that every manager, every supervisor and every team member must be able to help staff and colleagues to learn. The chief finance officer needs to be a professor of finance, too and direct his or her 'faculty of financial management'.
- 3 **Work with people who share your values.** When you do use outside consultants – and you will need to do so – work with those who share your values about learning. A good consultant will be a stimulant to future learning, not just solve a one-time problem or put on an entertaining show for a day or two.
- 4 **Facilitation not instruction.** In a learning organization, we help others to learn. Be careful to separate what can be taught (like the operation of computer software, which follows a set of pre-programmed instructions) from what must be learnt anew by each new learner, and for which there is no one answer (like managing people, working with others, responding to customers... and so on).

## HOW TO BUILD A CENTRE OF LEARNING IN YOUR ORGANIZATION

- 5 **Don't leave it all to HR.** The job of facilitation cannot be a job for the human resource department. While organizational learning and development specialists may take the lead in design and administration, facilitation, guidance and learning leadership is everyone's job.
- 6 **Never stop.** Being a good teacher means necessarily being a good learner. Think of the best teachers you have ever met. They brought enthusiasm and fresh ideas to what they did. They may have had a script but they did not stick to it rigidly. They worked with their audience. All great teachers do this, and they are able to do so because they never consider their own education complete. They are enthusiastic learners, able to share the joy of discovery with others and help others to gain it, too.
- 7 **Reflect, reflect.** Every time you instruct someone, work with a learning group or present an idea to others, stop and reflect on what you did. Try to think of just one way to do it better next time.
- 8 **Remember implementation.** The most profound learning comes from doing; seeing an idea through from inception through implementation through to consequences. Help people to stick to the ideas they develop and see them through wherever possible. Create an organization of doers, not advisors.
- 9 **Seek moments of leverage.** Noel Tichy, former director of GE's corporate development centre at Crotonville, calls them 'moments of opportunity'. Others call them 'teachable moments'. Some will be steps in an organization's hierarchy, like a first supervisory position. Many will be times of difficulty, such as a major error of judgement, a missed deadline or a lost sale. Make sure these are used wisely as moments of leverage, not misused and missed as opportunities.
- 10 **Lead from the front.** Chief executives can be learners too! There is no better example to those who complain that 'I'm paid to come to work, not to school' to see the chief education officer 'come to school'.

# 48

## Research

You can't possibly reach the same level as a university in terms of research generation, can you? Well, no – but you can do better! You haven't got years of tradition and academic boards and funding committees dragging you back. You can invent your research facility to suit your own needs – current and future.

- 1 **Action research.** Research isn't just about writing essays about essays, or surveying thousands of people to ask what they hypothetically might think of an idea. Action research is about really trying something out to see what happens. If you need to shorten order processing times – really shorten them by cutting steps, devolving authority, etc – and see what happens. Do it within a solid research framework with proper reporting and analysis and you have a classic action research project – and a more efficient order process.
- 2 **Bricks and mortar.** Don't start with real estate. Establish your presence in 'virtual estate'. You don't need a research building or a library – you do need good information system links, the right software and the right resources.
- 3 **PER.** As the Italians say – Piccolo, Economico, Rapido; small, cheap, quick. Make the most of not having to maintain a university infrastructure. Spend a month rather than a year setting a system up; use off-the-shelf software and adapt it rather than spending months having bespoke software written. Make your infrastructure disposable so you can keep it at the leading edge, technologically and intellectually.
- 4 **The virtual library.** You don't need to fill library shelves with dusty books and magazines. Review the many excellent on-line library services offered by publishers (like Elsevier, MCB and the professional institutions), publishing agents (like Blackwell, Ebsco and Faxon) and other data suppliers (like OCLC), and think about a subscription to the one or two which best suit your needs.

- 5 **Ask for what suits you.** On-line publishing is still a relatively new field. If you don't find an on-line supplier which suits you exactly – call the closest one or two and see if they will tailor their offering for you. It's quite likely they will be pleased to be given the challenge in their efforts to learn how to create products and services for this new market.
- 6 **Don't just capture it – make sense of it.** We've all heard of 'information overload'. Don't just capture comments made by customers and store them somewhere – that's just data, and too much data will lead to overload. Instead, make sense of a comment by putting it into the context of other comments, classifying it, using it to make conclusions and draw insights. That's making data into intelligence, and you can never have too much of that.
- 7 **Pool your knowledge with customers and suppliers.** Knowledge is a valuable asset. But it is only useful when it gets used, and its value normally increases, not diminishes, when it is shared. Link your systems with those of your customers and suppliers. Share what you are learning, and maybe they will do the same with you. Then you have a real partnership!
- 8 **Network.** Research knowledge is no use if it sits in a file drawer gathering dust. Share it all the way around your information systems.
- 9 **Don't build barriers.** Forget about 'need to know'. If you are mining new knowledge from your research activities, everyone 'needs to know'. Knowledge has no barriers of hierarchy or geography. Tell everyone everything.

# 49

## Make your senior managers into professors

The job of a senior manager is to make sure that everything runs according to plan – right? Well, yes and no. Today, a senior manager's job has to encompass that and more. He or she has to be directly responsible for ensuring that there is a future generation of capable people to help to grow and develop the business now and in the future. Senior managers have a specific role to develop those around them. In a learning organization, they are your professors. Here are some tips to help your senior managers to be professors in your organizational academy of excellence.

- 1 **Allocate responsibilities.** Refer to subject area heads with joint titles; VP of marketing and professor of marketing; finance director and finance professor. Embed the expectation.
- 2 **Write professorial responsibilities into job descriptions.** Write them into recruitment advertising. You will find over time that some potentially very able people will exclude themselves from the role and responsibility. If you are taking the creation of an organizational learning culture seriously you will say – so be it. We need professors of logistics management as well as highly able logistics managers!
- 3 **Write learning and development roles and outcomes into appraisal and reward structures.** People will not give of their best if they are asked to do one thing and rewarded for another. Make sure your reward structures are in alignment with your desired learning processes and outcomes.
- 4 **Keep up to date.** Subscribe to one or more information database services which collect the latest published information from books and journals. Try UMI's ProQuest ([www.umi.com](http://www.umi.com)), or MCB's Anbar or EMERALD ([www.mcb.co.uk](http://www.mcb.co.uk)), or UnCover ([uncweb.carl.org](http://uncweb.carl.org)) or any of the other excellent library database services accessible via the Internet.

## HOW TO BUILD A CENTRE OF LEARNING IN YOUR ORGANIZATION

- 5 **Share information.** Institutionalize information sharing and progress through meetings. Don't have a senior management meeting without learning and development on the agenda.
- 6 **Build facilitation skills.** Good transfer of information, whether by instruction or facilitation of group learning processes, needs to be built over time. Those with training, development and educational experience within (or outside) the organization can help to build facilitation and instructional skills. Run workshops; buy in a day or two of a good consultant or academic's time; encourage your senior managers to go to conferences and similar events to hone their skills.
- 7 **Include the outside world.** If there is a consortium of other organizations trying to pursue the same ends – join it. If not – form one. Make formal contact with your local universities and colleges and work together with them. Explore together what you can give and what you can gain.
- 8 **Coordinate your efforts.** If HR people are feeling threatened by others usurping their role – they need not be! The key coordination role of chairing internal faculty meetings, skill development, experience sharing, mentoring and organization-wide direction rests naturally with your HR professionals.
- 9 **Ensure learning is captured and downloaded.** Never buy a service from a consultant again without a clear plan as to how their knowledge will be downloaded into the organization. Bring service providers, such as consultants into your learning and development faculty, too. If your senior managers are your professors, these people are your visiting scholars.
- 10 **Encourage research.** Research about theory and other people's research belongs squarely in universities. Research about real problems, challenges and opportunities facing your organization – applied research and action research – belongs squarely in your organization. Arm your professors with the skills of action and applied research methodology so they can pass on those skills. There is an old saying – give a person a fish and you have fed them for a day; teach them to fish and they can feed themselves for life. If you equip the people in your organization with the skills to gather, assess, use and disseminate information, you will have given them the tools to feed themselves with learning for life.
- 11 **Publish.** Encourage all your learners, professors and others alike, to write their experiences and publish them; to give conference presentations; to give guest lectures at universities and colleges. Be proud of your learning organization, and tell the world through journal and magazine articles, books and conferences.



# 50

## Reward, recognition and evaluation

Learning is a journey, not a destination. But a journey with no signs along the way can be a long and dull one.

- 1 **Celebrate.** Learning needs to be fun! Celebrate milestones and progress with a quarterly party or an annual family barbecue.
- 2 **Certificate.** Get into the certification business. People love to display certificates and awards. It makes them rightly proud of their achievements. If your new intake has been through its introductory programme or your top team has completed an action learning project – send them out with a framed certificate and a formal graduation party.
- 3 **Credentialize.** In the *Wizard of Oz*, the Scarecrow wasn't as stupid as he said he was – but he didn't have a diploma! You don't have to be a university to award your own certificate in management or Executive Diploma in Engineering. Look at some of the in-company 'universities' (MacDonalds, Motorola, Unipart, Arthur D Little etc) for ideas.
- 4 **Be imaginative.** Nissan South Africa gave their staff a 'passport' which accumulated stamps as they completed programmes of development. Motorola turned their training department into a 'virtual university' serving their offices world-wide. You can make your own rules!
- 5 **Look for change.** Evaluate results by the changes people make and the actions they take. If someone takes action to improve at work it means there is a good likelihood that some real learning has taken place, and that what has been learnt was effective. Build on those successes.

*HOW TO BUILD A CENTRE OF LEARNING IN YOUR  
ORGANIZATION*

- 6 **Avoid the 'smile sheet'.** Don't evaluate your interventions using traditional 'smile sheets'. It matters more that real progress has been made than that people think the room was colourful or the food was good.
- 7 **Don't be shy.** Publicize successes. Post ideas and progress on walls and doors. If you have learning teams, put their picture in the in-house newsletter.
- 8 **Seek partnerships.** If you want to be a centre of learning excellence, talk to the people who do it for a living. Seek partnerships with your local college or university, or a distance study institution which seems to share your ideas and values. Ask them to certificate your programmes for you.

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