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The Nick Webber Trust

The Trust was set up in memory of Nick Webber, who died in a car accident at the age of 28 while working in Malawi as a volunteer lawyer. Nick was a friend of one of Martyn Sloman’s sons and it is asked that those who download this ebook consider making a donation to the charity. To donate please visit: www.justgiving.com/Martyn-Sloman2010ebook

To find out more about the Trust visit: www.nickwebbertrust.org.uk
Foreword

In the early part of 2008 I launched a research project called ‘L&D 2020: The future of workplace learning’, which aimed to investigate the world of work and how people grew and developed within organisations. As editor of TJ since 2000 I was increasingly aware of a change in the roles of the publication’s readers and felt it was my responsibility to keep abreast of such issues, informing readers about trends that would affect their future professional status.

We produced our first report in September 2008 and, shortly after publication, Lehman Brothers collapsed marking the start of the biggest shift in economic outlook in a generation.

Two years on, public sector organisations have to square up to the realisation that they are facing an extended period of under-investment, and it is clear that service levels and morale will only be maintained through the commitment and motivation of its people. As the MacLeod Review reported, the UK is competing with growing global competition and it is clear that our workforce is our strongest asset. As the methods and factors of production, along with the goods and services on offer, become more standardised worldwide it is clear that employee engagement and development is going to be ‘the difference that makes the difference’.

Research by TJ, the Chartered Institute for Personnel and Development (CIPD) and others are showing that the level at which learning and development will need to operate must increase for it to achieve the desired impact. This is reflected in the need for L&D practitioners to develop greater skill in strategic business understanding and analysis; the L&D function will need to be able to think about how it can lead business changes through the application of L&D rather than just responding to specific business problems that are presented to them.

In the autumn of 2009 we were pleased to welcome Martyn Sloman, the author of this ebook, to the TJ research project. Sloman is internationally known and respected as a researcher, author and commentator on L&D. Since then he has been gathering information to support the project’s ethos of identifying changes in which workplace learning is managed and delivered.

The premise of this ebook is built around a series of nine principles that Sloman believes should guide the L&D practitioner, and the most important of those in my view are the ability to: trust in your own judgement; build organisational benefit through higher value products and services; and understand that value lies in the beholder and the development of a learning culture.

The strength of Sloman’s argument lies not in providing answers, for in short there is no single neat solution to any problem, but in challenging us to re-think our old perceptions of how L&D professionals operate in the 21st century. My aim throughout this project is not to offer solutions but to provide some alternative views of the future and to give L&D practitioners core skills to stand them in good stead.

The most important attributes for the L&D practitioner of the future will be curiosity, courage and flexibility: the curiosity to get to the heart of a problem, to understand how their organisations operate and to ensure that people can deliver benefit through higher value products and services; the courage to ask difficult questions and to offer solutions that perhaps demand a change in focus for their organisations and learners, to move from a transactional to a transformational role; and finally – perhaps the most important of all – flexibility, for as the pace of change accelerates we all need to learn, unlearn and relearn in order to survive.

As Sloman says, ‘The main advice to the practitioner must be to trust your judgement, show confidence in yourself and formulate your own way in your organisation.’ Quite clearly the future offers real potential for those willing to grasp the opportunities as they arise. For those involved in workplace learning the challenge is keep an open mind, as the exploration of future possibilities is never more important than it is now.

Debbie Carter, Director of Research, TJ
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This ebook has been written to assist those who work in learning and development roles – the specialist professionals who carry responsibility for knowledge and skills development in organisations. Traditionally, the term ‘trainer’ has been used to describe this job. However, as the nature of business competition has changed, so a bewildering variety of job titles has appeared: learning, training and development; people development; organisational development; talent development; talent management. In accordance with the recent research undertaken by TJ, the title ‘learning and development (L&D) professional’ will be used throughout this ebook. It would be foolish to become hung up on arguments about titles or reporting lines; what matters is the role and effectiveness in the organisation.

Both positive and negative drivers have led to the production of this ebook. On the positive side the ‘new economy’ will create great opportunities for those with a professional interest in learning and development. However, and this is the negative driver, the profession is handicapped by an over-reliance on dated and inappropriate constructs and, as a result, the profession lacks self-confidence.

To cope with the demands of the changing economy the learning and development specialist must acquire greater self-belief and a clearer sense of perspective. The latter demands a new way of looking at our world. It requires the rejection of obsolete models that serve only to distract; it also requires a scepticism towards any superficially attractive new silver bullet or ‘ism’ which purports to solve all our problems with a single all-embracing solution.

Supporting, accelerating and directing learning is a complex and demanding activity based on an understanding of context and process. Fortunately, there is a good base of knowledge and experience to draw on and it is possible to offer constructs, models, guidance and tools to assist the process. However, the task must be undertaken within the organisation and only those responsible can determine what is best.

Only you know your organisation and only you will be held to account for success or failure. The new role for the learning and development professional is a consequence of changing business models and new perspectives on competition. Different organisations will vary in their approaches to building customer value; there are likely to be considerable differences between and across the public, private and voluntary sectors. However, whatever the nature of the organisation, this value will be built by the acquisition and application of the knowledge and skills of the workforce.

The new role for the L&D professional must begin with an understanding of the business model, or the way that the organisation builds value; like it or not we must all become economists. Learning and development is no longer a ‘trainer-centric activity’; it is no longer centred on what happened in the training room and on the skills required to make this an enjoyable and effective experience for the learner. It is about developing, through sustained activity that takes place in a variety of contexts and involves a range of people with different roles, the individual knowledge and skills that deliver better value products to the ultimate consumer or clients. In some senses this was always the case: the fundamental challenge is no different; however, the demands of the ‘new economy’ with its aware consumers, delivery through technology and global competition have made it much more intense.
Against this understanding a new sequence of activities is needed if L&D professionals are to make a significant contribution to the organisation. The recommended activities are:

- determine the skills needed to deliver value
- investigate how they are best acquired/developed
- ask ‘Who are the key stakeholders in shaping the learning process?’
- seek to develop a learning culture
- design, deliver and monitor the interventions that promote learning.

The above list will be developed more fully throughout this ebook.

In undertaking the analysis and making the recommendations three recent reports have been of considerable influence; detailed material will be drawn from them at various stages in the main text. These reports are as follows.

- **L&D 2020: Exploring the future of workplace learning.**  

- **Supporting, accelerating and directing learning: implications for trainers** (published by the Chartered Institute of Personnel and Development (CIPD) in November 2008 and available at [www.cipd.co.uk/subjects/lnranddev/general/_sadlrng.htm](http://www.cipd.co.uk/subjects/lnranddev/general/_sadlrng.htm)).

- **Higher skills development at work: a commentary by the Teaching & Learning Programme** (a commentary that draws on extended research projects and a higher skills development workshop held at the University of Warwick in March 2009; it is available at [www.tlrp.org/pub/documents/HigherSkillsComm.pdf](http://www.tlrp.org/pub/documents/HigherSkillsComm.pdf)).

Outlines of these three reports are set out in Summaries I, II and III in the appendices at the end of this ebook.

Taken together the main messages from these reports are as follows.

- Learning at work should be seen as a continuous culture rather than a set of standalone events.
- Learning must involve all stakeholders – especially the learner.
- Learning is related to the productive system of the company, the organisation of work, and the type and range of activities at work.

The challenge is to achieve progress in organisations that are differing in terms of ownership, structure, size and processes. This can only be done by those who have gained a thorough knowledge of the business and who display confidence in their own judgement on what matters.
2 Understand the difference between training and learning

Note the use of the word ‘learning’, which brings us immediately into a critical point: the distinction between training and learning. This difference is fundamental. The 2004 CIPD Research Report ‘Helping people learn’ offered precise definitions of the terms ‘training’ and ‘learning’. Training was defined as ‘an instructor-led, content-based intervention, leading to desired changes in behaviour’ and learning as ‘a self-directed, work-based process, leading to increased adaptive capacity’. Training and learning are related, but conceptually different activities.

Learning is a discretionary activity that takes place in the domain of the learner. Learning activities, whatever their form, will only receive managerial support if they are seen to add value to business and its customers or clients. They will only receive support from the learner if the learner is motivated and feels capable of undertaking them.

What matters to an organisation is the acquisition and application of knowledge and skills. The acquisition process is encouraged or facilitated by interventions. Training is one of these interventions, but only one. The skillsets that are needed to build value in today’s organisations demand a growing focus on their acquisition by the learner and less focus on the trainer’s skills of delivery. Hence the profession needs both a new mindset and a new skillset.

Crucially, the skillsets that are growing in value in today’s economy are increasingly acquired by learning rather than taught through training. This is especially the case with technology skills and what have become known as soft skills, or the skills involved in developing interpersonal relationships. In 2007 the latest edition of the UK government-financed report Skills at Work was published. The main conclusions were unsurprising: there had been a dramatic increase in the number of jobs that use automated or computerised equipment. Now it appears that more than three-quarters of the workforce use such equipment at work.

In the last five years there has been a marked increase in the proportion of jobs in which computing is considered an essential component – 47 per cent (nearly half the workforce) reported that they fall into this category. The numbers reporting a ‘simple’ use of computers has dropped. There has also been a substantial increase in the importance of the following skills: writing long documents, writing short documents, making speeches and presentations, persuading and influencing other people, instructing, and analysing complex problems in depth. These form many of the ingredients of a composite skill index that the Skills at Work researchers labelled ‘influencing skills’. Another set of skills, labelled ‘technical know-how’, has increased substantially in importance.

All this suggests that the service-led and knowledge-driven economy, however we choose to define it, is well on its way. Knowledge has become a key resource for the organisation and individual learning a key competence. To reinforce the point already made, although the emphasis will vary according to the nature of the organisation, many of the skills most critical to the modern business are learned rather than taught. Learner motivation is critical: many are capable of acquiring skills that would improve their performance but do not do so because they have no interest or incentive. How many poor presentations or lectures have you sat through because the presenter relies entirely on bullet-point text slides?
Moreover, the modern workplace comprises individuals who learn from each other in groups. If people are asked to recall how they learned the IT systems they use in the workplace, they may refer to attendance at a short course at some stage, but they will emphasise learning through trial and error or asking a colleague. Similarly, the acquisition of the bundle of skills round communicating and influencing are often acquired through practice and reinforced through feedback. A good boss makes a big difference.

Indeed, for some ‘new economy’ jobs the most valued skills are seen as entirely self-directed: something to be developed by the learner. The organisation’s role becomes one of facilitation – ensuring that learners have appropriate learning opportunities and are supported in their endeavours. The following case cameo offers an illustration of this point.

**Case cameo: Self-directed learning by an IT specialist**

Sameer Patel is a young Indian professional who works as a consultant for a major IT global software house which, among its other activities, provides business intelligence solutions for clients throughout the world. Patel is currently based in Singapore for six months, working with a team of six others on a major assignment for a public sector organisation. For the last four years he has specialised in data warehousing.

‘Data warehouse’ can be defined as a ‘repository of an organisation’s electronically stored data’.

In Patel’s opinion, the main skills he requires to do his job are: an ability to understand the business (which can only be acquired through experience); a knowledge of specific relevant IT tools and methods (e.g. Structured Query Language (SQL), a database computer language) and a knowledge and capability in the use of his company’s proprietary tools. He emphasises that it his responsibility to ensure that his expertise is kept up to date. The consultancy company informs him of all new developments of products and tools. He can then choose to learn about their application in a variety of formats. A classroom-based course will be available; there will be online training via the company intranet; and there will be computer-based training available in the form of a CD-ROM.

An important element in Patel’s learning is the use he makes of technical Internet communities on data warehousing. Some are located within the consultancy company: if stuck on a problem (a new proprietary tool exhibits a bug, for example) he will place a request for advice on a forum and is confident of receiving an answer. There are also valuable technical forums available outside the company in the public domain.

*A fuller version of this case cameo is available on the TJ website at* [http://www.trainingjournal.com/content/Self-directed-learning-by-an-it-specialist](http://www.trainingjournal.com/content/Self-directed-learning-by-an-it-specialist)
Disregard anything that was written in the last century

It is both surprising and disappointing how little new thinking has taken place in the L&D profession. Many of the models and constructs date back to the 20th century and in some cases the third quarter of that century. One model in particular no longer merits the prominence and credence it receives. This is the systematic training model that became increasingly accepted in the late 1960s on both sides of the Atlantic as the basis on which training should be undertaken. The model is shown diagrammatically in Figure 1.

In the USA the model has been embedded in the syllabuses of universities and colleges that teach a subject known as Instructional Systems Design. In the UK it often appears as the basis of recommended tools for trainers. The various industry training boards established by the Industrial Training Act 1964 all advocated, in some form or other in their literature, an approach which they labelled the ‘systematic training model’.

Essentially, it was thought appropriate to regard training as a series of sequential steps or stages. In the simplest expression these steps were identifying training needs, designing training, delivering training and evaluating training outcomes. Other expressions were extensions or developments of this basic sequence.

In whatever form it is expressed, the systematic training model has two important characteristics. First, it proposes a series of consecutive, but linked, interventions; second, the identification of needs is something that can be introduced into the training cycle at the appropriate stage. These needs are discovered by carrying out a thorough investigation of individual or group training requirements, by interpreting the overall objectives set by the organisation, or by a well-managed combination of the two.

The model is no longer adequate. The legacy has become a millstone. If taken literally, operating the systematic training model would send us round in circles in our own training world – rather than looking at the broader context in which we operate.
Learning is a pervasive and less formal ongoing process. The systematic training model sees the trainer as the centre of a process rather than one of a number of stakeholders involved in managing interventions to promote learning. It gives a spurious precision to an activity that by its nature is ongoing and unstructured. It has some value as a tool of training design but that is the extent of its value. It is time to move on as a profession.

Seeking a single pervasive model like the systematic training model is a mistake. The most appropriate processes, or interventions to support, accelerate and direct learning can be determined, but only within the context of the organisation. Successful design and delivery of these processes is a reflection of the skills of the learning and development professional.

This discussion raises the issue of which constructs or models should govern our thinking. A model can be regarded as something that should be copied; a construct as an image or object constructed from prior-impressions. Both words will be used to describe an L&D professional's way of looking at his or her world. Some constructs and models are wide in their scope and ambition; others are narrow. Many are obsolete but not all should be discarded.

A construct that definitely should be discarded is the one that purports to describe learner retention. It runs as follows: ‘People learn (or recall/remember): 10 per cent of what they read; 20 per cent of what they hear; 30 per cent of what they see; 50 per cent of what they hear and see; 70 per cent of what they say (and write); 90 per cent of what they say as they do a thing.’ It is sometimes called the cone of experience.

The difficulty with ‘learner retention’ is that it is completely bogus. For details see a very readable and thoroughly entertaining paper by two US engineering academics, Holbert and Karady. Somehow or other, learner retention and the cone of experience have become widely accepted despite the completely unsound basis. Does it matter? The answer is ‘yes’ because this folk myth appears to be enjoying a new lease of life in another form. For example, the widely respected US writer Jay Cross has recently claimed that informal learning accounts for 80 per cent of total learning; that said, so far there has been little worthwhile evidence presented to support this figure. Learning depends on context; there is a great difference between what applies at an international consulting firm and a small rural garden centre.
Distinguish between context and processes and seek to understand both

The new context in which today's L&D professional operates demands both a new mindset and a new skillset. The mindset is about the need to acquire an understanding of the economic drivers, the context in which the L&D professional is operating. It is also about the need to be pragmatic and to reject inappropriate or obsolete models. The skillset is about understanding the advantages and limitations of each of the various interventions or processes and being able to initiate and operate them effectively.

Probably the most important of the emerging trends identified in the TJ L&D 2020 project is ‘There will be a shift in balance of the L&D professional’s skillset towards greater business understanding, change management, organisation development and use of new technologies.’

Case cameo: The importance of understanding context

A misinterpretation of context can easily lead to an inappropriate choice of process. My students at Kingston University who are studying learning and development are asked how they would respond to a request that the author received in 2008. This came from a government department and concerned the perceived failure of managers to allow members of their department who fulfil trade union duties the time that they were allowed to undertake these activities. It read:

As you are hopefully aware, last year the Government held a review of workplace representatives’ facilities and facility time. In response to this review, many respondents raised the issue that middle managers were often acting as a barrier to representatives’ access to their facilities and facility time… It was felt that this was often caused by conflict between business requirements for workers’ time and the representative’s right to facility time.

To try to address this, the Government committed, resources permitting, to provide an e-training course to help middle managers better manage their resources for the benefit of both employers and representatives. … We would very much welcome the CIPD’s advice and support.

The underlying problem here is that the relevant managers probably see little purpose or advantage in giving their subordinates who act as trade union representatives time off. If this is the case, what is needed is an intervention to change their point of view. Making them sit through an e-training module will not achieve this objective; the managers will try to avoid doing it or simply go through the motions – something that is easy to do with computer-based training. In their grumpy mood they would not ‘learn’ anything – however the word is defined. The one redeeming feature of the request is that it uses the term ‘e-training’ rather than ‘e-learning’, which reflects the top-down nature of the proposed approach.

The failure to allow sufficient time off reflects different managerial priorities. If time off for trade union activities matters to the organisation (and here it is a big ‘if’), what must be addressed is the judgement or attitudes of managers – probably the latter. Judgements or attitudes will best be altered by a clear message from the top, suitably reinforced. Why not a series of informal lunchtime meetings in which senior managers stress the importance of trade union activities to their junior colleagues?
The example on page 8 reinforces the value of one of the most useful or relevant constructs or rubrics available to learning and development professionals today. This is the categorisation of what can or should be taught or learned in the workplace into knowledge/skills/judgement or knowledge/skills/judgement/attitudes – sometimes behaviours can be included in the list. This distinction has been developed over time by generations of trainers who have drawn on academic research on learning and skills, particularly the work undertaken by Benjamin Bloom in the 1950s. Observant readers will note that a recognition of the continuing value of this construct contradicts the third principle in this ebook: ‘disregard anything that is written in last century’.

However, this construct remains of value: it reminds us of an important point. Different desired outcomes will require different processes to assist or facilitate learning. If we are trying to develop skills (whether physical or social) learners will need time to practice and to receive feedback. If we need to increase knowledge learners will need clear access and time to absorb and reflect. Judgement and, even more so, attitudes, are acquired over time in an organisational context where they are displayed.

**Learning factors and learning context**

One of the three major current reports identified in Chapter 1 of this ebook is the Teaching and Learning Research Programme (TLRP) Commentary ‘Higher skills development at work’. This commentary was the source of the important observation: ‘Learning is related to the productive system of the company, the organisation of work, and the type and range of activities at work.’

Figure 2 is taken from the commentary. It is adapted from the work of Professor Michael Eraut of Sussex University and fuller references are set out in the TLRP publication.

The diagram is particularly helpful in that it draws attention to a full range of factors that can influence or affect the predisposition or willingness of learners to acquire knowledge and skills at work. Every one of these factors can be influenced positively by an effective intervention. Many of these interventions fall into the domain of broader human resource policies, rather than learning and development.

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**Figure 2: Factors and context**

- **LEARNING FACTORS**
  - Confidence and commitment
  - Personal agency and motivation
  - Challenge and value support of the work
  - Feedback and support
  - Allocation and structuring of work

- **CONTEXT FACTORS**
  - Encounters and relationships with people at work
  - Individual participation and expectations of their performance and progress

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Building business advantage through the knowledge and skills of the workforce requires a good understanding of what is increasingly called the ‘business model’ (defined later in this chapter). Only when this is in place can the interventions and processes needed to develop these skills be determined.

Competition in the modern economy is both intensifying and changing in nature. More aware and sophisticated consumers and growing global competition are prompting organisations to take a fresh look at their business models. In particular, many organisations (regardless of their sector or geographic location) have recognised that competing on cost alone can no longer be an attractive proposition. Hence businesses are seeking to take full advantage of the ‘service-led and knowledge driven’ economy through offering higher-value goods and services for which customers or clients are prepared to pay a premium price. From a national perspective, governments throughout the world are seeking to devise and implement policies that prevent a decline into a low value, low productivity and low wage economy.

An important catalyst in the move to higher-value products is, of course, the universally available tool of information and communications technology (commonly abbreviated to IT). One of the founders of the widely admired Indian technology-based consultancy Infosys has recently expressed the opportunities in the following terms: ‘The information economy is the culmination of what the Industrial Revolution started – it has placed human capital front and center as the main driver of productivity and growth’.  

The above can be summed up in the principle that L&D builds organisational benefits through higher value products and services. The challenge is how to do it in practice in the context of the organisation. Terms are used interchangeably and often loosely. The vocabulary used to describe the new basis of competition is still emerging and terms are used imprecisely and interchangeably. One issue facing the L&D profession is the danger of becoming hung up on vocabulary through, perhaps, over-analysis and over-definition. An intuitive understanding is often sufficient. Some of the more useful terms have been listed in Table 1.

| Business model | A business model is a conceptual tool that contains a set of elements and their relationships. It is a description of the value that a company offers to one or several segments of customers (drawn from a 2005 paper by Osterwalder et al). |
| Human capital | Human capital refers to the stock of competences, knowledge and personality attributes embodied in the ability to perform labour so as to produce economic value. It is the sum of the attributes gained by a worker through education and experience (from Wikipedia). |
| New/knowledge economy | The new economy describes the evolution of developed countries from an industrial/manufacturing-based wealth-producing economy into a service sector asset-based economy. ‘Knowledge economy’ is a term that refers to an economy of knowledge focused on the production and management of knowledge in the frame of economic constraints (from Wikipedia). |
| Service-led and knowledge-driven | ‘Service-led’ and ‘knowledge-driven’ has been used throughout CIPD’s ‘Helping people learn’ study to describe the focus of the skills and competencies of the new or knowledge economy. |

Table 1: The new business context – some definitions
This new emphasis for the function is of great significance. While one can argue about the extent of the changes and the precise terminology that should be used to describe them, the essential message runs as follows. In a service-led and knowledge-driven economy, what matters is delivering products and services that customers value. Different organisations will use different approaches to building this customer, client or user value; there are likely to be considerable differences between how value is perceived in the public, private and voluntary sectors.

However, this value will be built by the acquisition and application of the knowledge and skills of the workforce. This is why the creation of a sustained high-wage, high productivity economy is the aim of governments throughout the world. Some countries may be rich in natural resources but most others will be competing in an increasingly global market for goods and services. Here any competitive advantage must be built on workforce skills.

Moreover this idea – that the purpose of L&D is to build organisational benefits through higher value products and services – is well understood by senior management in today’s organisations though they may not express it in those terms. It can form the basis of the most effective dialogue between the L&D professional and the business leaders (see the section in Chapter 8, entitled ‘What are the critical skills?’).
Value lies in the eye of the beholder

This is probably the most complex and controversial of the principles; it is based on the premise that senior managers will carry their own perceptions of the value that is generated by training and learning interventions. These perceptions are important and real.

The L&D profession is facing and will continue to face two important problems. The first is that of aligning the learning, training and development interventions with business objectives. The second is to determine the most appropriate method of assessing and reporting on the value of learning.

A starting point is to reflect on a powerful observation proposition that the leading HR commentators Dave Ulrich and Wayne Brockbank presented in a 2005 book, *The HR Value Proposition*. Here they argued:

> Value in this light is defined by the receiver rather than the giver. HR professionals add value when their work helps someone reach their goals. It is not the design of a program or declaration of policy that matters most, but what recipients gain from those actions.

A domestic illustration may help to underline this general but crucial point. Some years ago my wife and I went on holiday to the South of France. Since she had organised the accommodation and all the travel, she suggested that in return I might arrange a night out for the two of us. I readily agreed and set about my task with enthusiasm, securing two tickets for us to see Nimes play Toulouse at rugby at the Stade Nicolas Kaufmann. For some reason this didn’t go down too well! My mistake had been to put a great deal of effort into something that my wife, its intended recipient, didn’t value as much as I did. As L&D professionals we often do something similar when we try to demonstrate the value of what we do, rather than trying to understand what matters to those at the receiving end of our efforts. Our reports are too often intended to justify our activities and defend the department against perceived (and often imaginary) attacks.

Recent research on the value of learning (for example, the 2007 CIPD report on the value of learning\(^9\)) has emphasised the importance of putting more effort into dialogues on up-front alignment – making sure that learning, training and development interventions reflect business priorities. If this is achieved they will be respected and supported within the organisation, and gain important senior backing from senior management. It is true that this is easier said than done and can only be undertaken in the context of the organisation. The following short case cameo offers an illustration.
Case cameo: Organisational trend analysis at Legal & General

Legal & General employs 7,000 people in the UK, of which approximately 1,200 are managers, who are supported by a Legal & General management development team.

Organisational trend analysis is an intervention, instigated and managed by the Management Development department, which is designed to identify and reinforce the behaviours that will create business success for the organisation. Two main tools are used in organisational trend analysis. The first is a 360-degree appraisal, which was designed and developed internally. The second set of tools is three separate psychometric instruments developed by Robert and Joyce Hogan PhD. One relates to motivation, values and preferences, a second is a personality inventory, and the third is a development survey instrument which to date has been used for the most senior manager.

Although this information provides much useful information for individual development, organisational trend analysis is seen as an important corporate business tool. According to Alison Bateman, Legal & General’s head of Management Development, ‘We can use the information gained on an individual basis, a team basis and for the overall organisation.’ The organisational dimension involves a review against the behaviours that are required for business goals. The output from the instruments allows a comparison with the current position and appropriate human resource interventions to be undertaken. Bateman stresses that these extend beyond development, through the leadership programme designed around the output from organisational trend analysis, and encompasses recruitment and retention. One area of recent investigation, for example, was why individuals displaying certain desirable behaviours chose to leave the organisation.

A fuller version of this case cameo is available on the TJ website at http://www.trainingjournal.com/content/legal-and-general-organisational-trend-analysis

Perhaps the best indication of the L&D profession’s failure to think through the implications of the service-led and knowledge-driven economy has been the unhealthy obsession with proving value through return on investment (ROI), another model from the previous century.

The profession’s traditional model of evaluation is based on assessing the impact of interventions that emanate from the training department. A broader set of measure is now required and these form part of the wider process of the management of learning in the organisation.

Of course, this does not mean that there is no obligation to report, in financial terms, on the impact of interventions and the effectiveness of processes. It is simply that the method of reporting must be revisited. For the L&D professional the two key questions are ‘Are we putting our efforts towards the right objectives?’ and ‘When we have identified these objectives, are we operating with maximum effect?’
Against this background recent CIPD research has suggested that using return on investment (ROI) as the bottom line may not be the best criterion for determining the value of learning. For a small range of learning interventions it may be a good indicator but it is not ‘the indicator’. Instead, the research pointed to the usefulness of return on expectation (ROE) measures as part of the assessment of the value of learning. As the utility of the traditional return on investment approaches is seen to be limited, so return on expectation measures are being developed. These involve establishing in advance the anticipated benefits of learning interventions or investments and then assessing the extent to which the anticipated benefits have been realised. Return on expectation measures make use of both ‘hard’ and ‘soft’ information and assess the extent to which the anticipated benefits of the learning investment have been realised.

This is an emerging but exciting area. It is demanding and a work in progress for the L&D practitioner. Those interested are referred to the 2007 CIPD report on the value of learning mentioned earlier and the CIPD factsheet on evaluation.
Try to develop the learning culture

In their 2008 report on supporting, accelerating and directing learning the CIPD presented what it described as its partnership model. This model is reproduced in Figure 3 and illustrates some important elements in promoting learning in organisations, as follows.

- The continuous nature of the move from an isolated role for training to a culture where learning is seen as relevant to the needs of the business and of the learners, and integrated in the day-to-day activities. This element is shown in the two arrows at the top and bottom of the figure.
- The shift to a learning culture is an aspiration; in practice it will take a long time and success in any organisation may be patchy, or even go into reverse on occasion.
- The heart of the figure shows the roles and relationships of the stakeholders in a continuous, integrated learning culture.

More than anything else the model illustrates that learning and development professionals are not effective when they see themselves as operating in isolation – when they adopt a trainer-centric mindset. Movement to establish an effective learning culture requires participation and support throughout the organisation.

Without question one of the most important features of the last few years has been the growing emphasis on the role of frontline (or firstline) managers. In France this role is called the ‘manager de proximité’. Increasingly, through the performance review process or otherwise, the learner’s immediate boss can have the critical role in encouraging and motivating the desire to learn and in creating the opportunities. Fortunately there is now a wealth of literature available on the processes involved. Particularly recommended is the 2007 CIPD publication ‘Learning and the line: the role of line managers in training, learning and development’.  

15
Over a decade ago researchers at the Ashridge Management Centre suggested that training and development could be characterised by three different levels of sophistication. These were: a fragmented approach (where training is not linked to organisational goals and is delivered in a non-systematic way); a formalised approach (where training and development becomes more structured and is linked to organisational processes such as appraised systems); and a focused approach (where the emphasis moves from formal training to personal development).

The idea of building a learning culture by moving the organisation through a clear ladder of progression in stages is attractive. However, to emphasise, such progression requires understanding, activity and commitment from all stakeholders in the training and learning process – not just the training professional. This is illustrated in Table 2.

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<table>
<thead>
<tr>
<th><strong>Fragmented</strong></th>
<th><strong>Formalised</strong></th>
<th><strong>Focused</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employer (i.e. senior management)</strong></td>
<td>No link perceived between business success and learning. May support individual requests for learning opportunities on an ad hoc basis.</td>
<td>Supports professionals by actions such as signing off training policy, approving budget. May introduce development planning or carry out succession planning for the Board.</td>
</tr>
<tr>
<td><strong>Line manager</strong></td>
<td>Does not see learning as his/her responsibility though may respond to individual ad hoc requests.</td>
<td>Meets with HR to discuss training needs of self and own team. Takes part in formal appraisal processes, coaching and training programmes.</td>
</tr>
<tr>
<td><strong>Individual learner</strong></td>
<td>Acquires the skills and knowledge required for job role and waits to be told what is next. The more ambitious may look for opportunities for learning to follow personal aspirations, learning in own time and sometimes at own cost.</td>
<td>Needs identified at appraisal with manager. Takes part in courses offered as part of the formal organisational plan. May learn on or off the job.</td>
</tr>
<tr>
<td><strong>In-house training professional</strong></td>
<td>Supports individuals or line managers who seek them out. Delivers statutory training courses and evaluates reactions.</td>
<td>Develops and communicates training plans to meet the needs identified at appraisal. Ensures that training is delivered efficiently and meets the identified needs.</td>
</tr>
</tbody>
</table>

*Table 2: The ladder of progression*
Different interventions have different strengths and weaknesses

So far the discussion has concentrated on context; our attention will now shift to processes. It will move on to consider the skills needed to deliver value and to investigate how they could best be acquired or developed. These questions are always specific to the organisation. As has been noted different organisations will use different approaches to building customer, client or user value; different people will learn in different ways.

However, whatever the context, supporting, accelerating and directing learning will be achieved through a series of well-planned and well-delivered interventions. The L&D professional’s role is to initiate, manage and monitor those interventions. In this section we will consider the choice of interventions; in the next section we will examine the role of the learning and development professional.

So what are the interventions or processes that the organisation can make – the training interventions – that can promote individual learning the organisation will value? This question has been the major focus of much of training literature for the last 50 years. Some topics – e.g. classroom training and coaching – have been analysed to death. The literature contains a superabundance of tips and tricks. A major criticism of this extensive literature is that it is trainer-centric; it is written as though the trainer is the centre of the universe.

Today’s learning and development manager must adopt a different mindset. In the service-led and knowledge-driven economy the following two tasks must be undertaken. First, determine the skills that must be developed to deliver business value; second, determine the most effective way of encouraging, instructing, facilitating or supporting learners in their acquisition of these skills. Here the single word ‘skills’ is used for the knowledge, skills, judgement and attitude that the workforce need to deliver business value.

What are the critical skills?

The best approach to both determine the key skills and determine the most effective way of nurturing these skills is to build up information by systematic investigation. Business leaders should be asked to identify the knowledge and skills required to deliver value; the learners themselves should be questioned on their preferences on learning. The precise questionnaire and approach again depends on the business context – this is where L&D professionals demonstrate their skillset.

However, some lists that may assist the L&D professional are presented in this section. At the outset the following question should be asked: does the organisation deliver value primarily because it is service-led or because it is knowledge-driven? In practice almost every organisation will involve elements of both, but the emphasis will differ. The important point about this question is that, by asking it initially, the focus of the discussion shifts away from learning and development into the area of business value.
The next stage is to ask business leaders some important questions.

- What is the nature of the business? How do you compete?
- Are there any particular groups of the workforce who are critical to business value? Is there a critical cluster of workers? What knowledge and skills do they need?
- How are these key skills acquired? Is it through: external recruitment, recruitment from within or training?
- If they are trainable (or learnable) skills how are they trained/learned?
- To what extent do you compete on knowledge and skills? How does learning and training add strategic business value?
- Looking to the future, what do you see changing on the business skills front?14

Answers from these questions can form the basis of a modern learning and development plan.

In today’s economy it is increasingly evident that there is a wide range of relevant skills that build value and a number of different ways of acquiring them. However, judging from the past, the skills identified by business leaders will be concentrated on certain key groups of workers (for example, research scientists or telephone sales). To prompt this discussion the following broad classification can be presented.15

<table>
<thead>
<tr>
<th>PRODUCT/BUSINESS KNOWLEDGE</th>
<th>Theoretical knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical know-how</td>
<td></td>
</tr>
<tr>
<td>Theoretical knowledge</td>
<td></td>
</tr>
<tr>
<td>BASIC SKILLS</td>
<td></td>
</tr>
<tr>
<td>Literacy skills</td>
<td>Numeracy skills</td>
</tr>
<tr>
<td>Physical skills</td>
<td></td>
</tr>
<tr>
<td>APPLICATIONS OF SOFT/INTER-PERSONAL SKILLS</td>
<td></td>
</tr>
<tr>
<td>Communication (internal)</td>
<td>Communication (clients)</td>
</tr>
<tr>
<td>Coaching and feedback</td>
<td>Fault checking skills</td>
</tr>
<tr>
<td>Negotiation skills</td>
<td>Influencing skills</td>
</tr>
<tr>
<td>Being assertive</td>
<td>Empathy skills</td>
</tr>
<tr>
<td>Collaborative skills</td>
<td></td>
</tr>
</tbody>
</table>

APPLICATION AND USE OF HIGHER SKILLS (SHOWING ATTITUDE, APPROACH, INGENUITY)

- Managing change
- Planning skills
- Taking initiatives
- Networking skills
- Problem-solving skills
- Being resourceful
- Being creative

Table 3: A skills classification
How are skills acquired/developed?

Ways of acquiring skills are not the same as ways of delivering training. The following is offered as a list of the ways in which members of the workforce can acquire the necessary skills. The important thing about the list is that each of these ways has its advantages and disadvantages. Some ways of learning do involve training (e.g. the formal course), whereas others involve self-directed learning (e.g. accessing information from the Internet). Indeed, as has been shown earlier in this ebook (see the Chapter 2 case cameo entitled ‘Self-directed learning by an IT specialist’), in some ‘new economy’ jobs (e.g. in IT) the skills required may be entirely learned skills. This requirement presupposes a considerable degree of learner awareness, understanding and self-motivation. The list (see Figure 4) is presented in descending order of the degree of formality – the extent to which a planned intervention is required.

- Studying for academic qualifications
- Studying for technical/vocational qualifications
- Attending a formal training course with current employer
- Attending a formal training course with previous employer
- Being coached and mentored by others
- Studying manuals, books, videos CD-ROMs or online materials
- Accessing information from the Internet
- Watching and listening to others at work
- Doing this job or similar work on a regular basis
- Doing activities unrelated to work

*Figure 4: List of skills presented in descending order of formality*

One area where there is ready up-to-date information available is on the popularity and perceived effectiveness of different interventions to promote learning. The annual Learning and Talent Development survey published by CIPD always contains relevant information, as the following extract and Figure 5 from the 2010 survey report illustrate.

*All organisations were asked which three learning and development practices they believe are the most effective. Activities showing an increase in perceived effectiveness since 2009 include in-house development programmes (56 per cent in 2010, compared with 48 per cent in 2009), coaching by line managers (51 per cent compared with 47 per cent), and on-the-job training (30 per cent compared with 27 per cent). These are also the activities seen to be the most effective overall. Only external conferences, workshops and events and coaching by external practitioners showed a decrease in perceived effectiveness compared to last year (respectively 9 per cent compared with 16 per cent and 16 per cent compared with 18 per cent).*
Another useful source of advice from practitioners is TJ Online Discussion Forum and Daily Digest www.trainingjournal.com/forum.

### The role of technology

This section on the strengths and weakness of different interventions will conclude with a brief discussion of the progress that has been made with learning technology. One of the emerging conclusions presented in the TJ L&D 2020 Phase I report was: ‘New technologies are not just ways of delivering the same content differently; they open up new opportunities for people to learn.’ This is undoubtedly correct and it is important that the L&D professional adopts a more thoughtful and realistic perspective and manages its future advance more effectively.

Far too often any discussion of e-learning is surrounded by over-statement and hype. The CIPD, in a factsheet on e-learning, suggested that the following principles should underline any strategy for e-learning.

- Start with the learner – recognise the limitations of the population that you are trying to reach.
- Relevance drives out resistance – if the e-learning material is seen as relating to something that matters in the organisation, people are more likely to try to use it.
- Take account of intermediaries. Much learning requires an intermediary to advise and direct the learner. This is just as true of e-learning; it will not be successful if taken in isolation from other learning.
- Embed activity in the organisation – this is a subtler point, but follows from the previous one. E-learning modules should be seen as one element in an organisational learning strategy; where possible their use should be linked with instructor-led courses and other human resource management systems (for example, performance appraisal).

<table>
<thead>
<tr>
<th>Effective L&amp;D practices</th>
<th>% 2010</th>
<th>% 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-house development programmes</td>
<td>56</td>
<td>48</td>
</tr>
<tr>
<td>Coaching by line managers</td>
<td>51</td>
<td>47</td>
</tr>
<tr>
<td>On-the-job training</td>
<td>30</td>
<td>27</td>
</tr>
<tr>
<td>Job rotation, secondment and shadowing</td>
<td>30</td>
<td>24</td>
</tr>
<tr>
<td>Coaching by external practitioners</td>
<td>16</td>
<td>18</td>
</tr>
<tr>
<td>Action learning sets</td>
<td>21</td>
<td>17</td>
</tr>
<tr>
<td>External conferences, workshops and events</td>
<td>9</td>
<td>16</td>
</tr>
</tbody>
</table>
• Support and automate – this final catch-all point reinforces and underlines the others. E-learning does not offer us the opportunity to automate all our learning processes. Instead it is a powerful new element in a wider strategy which requires support for learners in the context in which they learn.

These principles remain sound and should be applied to any new development in technology that will impact on training delivery.

More sophisticated technology and more confident users create new opportunities but these will not necessarily translate into activities that develop the knowledge and skills that add value to business and its customers or clients. Whether this welcome outcome will occur is all about learning, not technology. Undoubtedly some organisations have managed the use of technology in the workplace to considerable effect. This is especially true of call or contact centres. The following case cameo offers an illustration of this point.

Case cameo: Developing adviser skills at LEGO Consumer Services Europe

Some 8,000 people are employed by LEGO worldwide. Slough, about 20 miles west of London, is the site of the UK customer centre that is the subject of this case cameo. Eighty advisers work at the centre serving most of Europe (there is another centre in Connecticut, USA). The Training & Development manager for Consumer Services Europe is responsible for ensuring that advisers acquire the necessary knowledge to enable them to become effective in the role as quickly as possible (‘time to competence’).

On arrival new advisers undertake two weeks of induction, which is delivered by the T&D manager with the support of other experienced staff in the training room. This covers the LEGO culture, systems and products, and guidelines and policy. After the two-week period they will be placed in a team, allocated a buddy and proceed to take calls using ‘training leads’, which are dual headsets. Their development to full effectiveness (which can be as short as three weeks) is monitored and managed by the team’s leader, known as the performance coach.

Advisers will deal with about 60 contacts (phone or e-mail) in a day. On arrival they will open up a number of systems, which give them access to customer information, addresses and progress on orders. The important product knowledge system is ‘brickfinder’, which is part of an overall customer response system (CRS). This allows the adviser, in conversation with the customer, to identify any missing brick and review the product building instructions at all stages. For any product it can allow a search by colour. Every major kit or product has a short on-screen information narrative highlighting any experiences or issues that have been encountered.

A fuller version of this case is available on the TJ website at http://www.trainingjournal.com/content/lego
L&D is a craft activity which takes place in context

In the final section of this ebook we will consider the role of the learning and development professional. There is no doubt that this will remain a subject of considerable discussion and debate. There are those commentators who see a closer link with performance management emerging; others advocate a greater dependence on technology.

What has been argued throughout this ebook is that learning and development has been changed dramatically as we have entered the service-led and knowledge-driven economy. L&D is now seen to build organisational benefits through allowing higher value products and services to be offered to the customer or client. That is what gives the function its growing importance. The challenge is how to achieve this in the context of the organisation. There is no single magic solution or ready formula that can be transferred from elsewhere. The main conclusions must be that L&D is and will continue to be a craft activity: it demands the essential understanding of what produces business value; it requires a capability in executing the sequence of activities set out in Chapter 1:

- determine the skills needed to deliver value
- investigate how they are best acquired/developed
- ask ‘Who are the key stakeholders in shaping the learning process?’
- seek to develop a learning culture
- design, deliver and monitor the interventions that promote learning.

This is a wide-ranging and multifaceted set of activities, which extends far beyond the role of the trainer as traditionally perceived. A recent rounded expression of the future role of the L&D professional can be found in the CIPD’s HR profession map. This was published in 2009, following extensive research and discussion as a ‘comprehensive view of how HR adds the greatest sustained value to the organisations it operates in, now and in the future’. Learning and talent development is one of the ten professional areas and its purpose is to ensure that ‘people at all levels of the organisation possess and develop the skills, knowledge and experiences to fulfill the short- and long-term ambitions of the organisation and that they are motivated to learn, grow and perform’.

One inevitable consequence and this can be seen from the CIPD’s map, is that there will be a convergence of the wider activities involved in human resource development. Some practitioners, for example, would make the case for a merger between learning and organisational development (OD). The following case cameo offers an illustration.
**Case cameo: Learning and OD at the Civil Aviation Authority**

Sati Kaur, head of OD at the CAA, joined the organisation nearly five years ago as head of L&D. It is a reflection of the nature of the work her team is currently doing that her job title has changed.

The core L&D team was small, with two people delivering standard curriculum-based training courses. Drawing on previous experience, when the opportunity arose to recruit new people to fill these two roles, she took the opportunity to look for ‘hybrid’ L&D people – those that were not just excellent at delivering standard training but who could act as L&D consultants or business partners.

This need for ‘hybrid’ roles is highly influenced by the small size of the team and the requirement to be able to respond to business needs. However, it is increasingly recognised in the organisation that the real added value offered by the team comes from the consultancy and tailored interventions that it is delivering. The focus is very much on embedding change through the activity it delivers, rather than just delivering courses.

The core skills of the L&D consultants are not only training skills (including training needs analysis, design, delivery, facilitation, coaching and evaluation) but also business understanding and consultancy skills. These latter two include the ability to talk to the business in its language, understand what it is trying to achieve, ask intelligent questions and identify how they can best add value. This also includes the ability to build relationships with clients at all levels and generate personal credibility through successful delivery. Managing and influencing stakeholders throughout the business are regarded as essential skills through understanding the people and their business goals, and through drawing on the evidence base to propose the most appropriate solution.

*This case is available on the TJ website at [http://www.trainingjournal.com/content/civil-aviation-authority](http://www.trainingjournal.com/content/civil-aviation-authority)*

While we can expect an ongoing debate on the boundaries of the profession, and on job titles, we can be more certain on the skillset. Here we can commend a model developed for the TJ L&D 2020 project. In the course of the research the skills needed by the L&D professional were reviewed and what was described as a T-shaped model produced. To quote from an article by Paul Fairhurst, which appeared in the September 2009 edition of TJ:

*Many consulting organisations talk about T-shaped people, having a broad understanding of the whole business (the top of the T) and an in-depth knowledge in their specialism (the upright of the T). These two dimensions are then deployed through their consulting skills. [See Figure 6.] This model of thinking might be a useful way for L&D people to think about their portfolio of skills.*

*So, L&D professionals need a deep understanding of what L&D can do, how it can do it and what new approaches might be possible, as well as understanding the evidence base that supports these. Depending on the role, they may also have a portfolio of possible delivery options that they themselves can deploy.*
This seems an excellent expression of the new skillset, distinguishing as it does between the business knowledge (the top, horizontal, bar of the T) and the specialist professional skills (the vertical bar).

This $TJ$ approach is consistent with the recent work undertaken at CIPD. Its 2008 publication ‘Supporting, accelerating and directing learning’ offered the following as a role definition for the L&D professional:

Supporting, accelerating and directing learning interventions that meet organisational needs and are appropriate to the learner and the context.$^a$

This role definition accords well with the arguments presented in this book. The organisational needs are about producing value. The emphasis is placed on learning, which is a discretionary activity that lies in the domain of the learner rather than delivering training. The context in which the business operates and the learner learns need to be fully understood if the interventions designed to promote learning are to command support from learners and their managers.

However, in making the transition to 2020 the profession will face a continuing threat – it has always been far too susceptible to the easy solution and influenced by current fashion. The US writer H.L. Mencken, known as the sage of Baltimore, once wrote: ‘For every complex problem, there is a solution that is simple, neat, and wrong.’ He could have had L&D professionals in mind when he wrote this.
This point becomes evident from an examination of Figure 7. This shows the number of occasions that a term was recorded as registered by staff at CIPD Global Information Services and Technology across a range of periodicals and journals.

![Number of references in journals and periodicals in CIPD library](image)

The figure shows just a selection of the relevant terms. Giving the changing numbers and nature of publications that the CIPD library purchases this analysis cannot purport to be a serious academic study. That said, the main point is abundantly clear. All the terms that appear have something to do with delivering value through learning. All have had a period of popularity and proved to be a nice little earner for a conference. However, to date none have stayed the course as a construct or model that should govern the activities of the L&D professional.

One other point is clear. While many other terms have apparently had their day, ‘talent management’ is now emerging as the market leader. Depressingly this is a loose umbrella term. It can be broadly defined as the systematic attraction, identification, development, engagement and retention of those staff who are of value to the organisation. This is almost a definition of the entire human resource process – a description of a problem rather than a construct to take us forward to a solution. It seems that we learning and development professionals will always struggle to establish our own vocabulary. This brings to mind the Chinese proverb: ‘The beginning of wisdom is to call things by their right names.’ However, for the L&D professional it is probably more important to do the right thing in the relevant context than to agree on a vocabulary.

So the final argument presented is to be wary of the latest fashion – it’s likely to pass. Essentially the main advice to the practitioner must be to trust your judgement, show confidence in yourself and formulate your own way in your organisation. If we can do this as a profession exciting times lie ahead and we can look forward to 2020.
In conclusion

The discussion in this ebook has been based around nine separate principles. It is time to bring this discussion together and offer a general conclusion. A useful starting point for this is to recognise that the most important ‘new principle’ is the fifth: ‘L&D builds organisational benefits through higher value products and services’. Learning and development professionals will gain credibility and influence if their activities are seen to assist the organisation fulfil its business model and move up the value chain. Any other L&D activities will be regarded as peripheral (or self-indulgent) and treated accordingly. The remaining eight principles are the consequences of the new role. They are about the new mindset and skillsets needed to undertake this model role.

However, nobody should underestimate the extent of the changes required. The ‘old training’ of delivering modules from a menu of courses to whoever happens to turn up is not wholly dead. There will always be a role for the skilled classroom trainer who can galvanise and motivate learners and impart the skills needed to do the job – and give them the self-confidence to attempt new things. But this is simply a part of a much broader and expanding picture. By adopting new mindsets and embracing the wider skills made explicit in the T-shaped model we can and should achieve much more. An exciting and demanding future lies ahead. Good luck with it.
Endnotes

4 Holbert, K.E. and Karady, G.G. (2008) Removing an Unsupported Statement in Engineering Education Literature, Proceedings of the 2008 American Society for Engineering Education Pacific Southwest Annual Conference. What the authors found was that, in a series of works culminating in 1969 edition, A US educator named Edgar Dale produced, for a book on audiovisual teaching methods, a ‘visual analogy’ which he called the Cone of Experience. At the base of the cone was ‘Direct Purposeful Experiences’; at the apex was ‘Verbal Symbols’; in between were a number of interventions that could promote learning (e.g. study trips, educational television). The first use of percentages appeared in a 1967 magazine article by an author, D.G. Treichler, who was affiliated with a prominent oil company. Treichler did not provide details of the source of the numbers and said they were only approximate and subject to exceptions. After investigations, Holbert and Karady concluded that the percentage figures on learner retention did not appear to be based on any evidence.
8 Wikipedia is a free encyclopedia; it can be accessed at http://en.wikipedia.org/wiki/Main_Page
10 CIPD factsheet, Evaluating learning and development, accessible at www.cipd.co.uk/subjects/lrnanddev/evaluation/evatrain.htm
14 The list is drawn from work undertaken by the author at the Institute for Adult Learning (IAL), Singapore, for a project entitled ‘Delivering business value through skills’. Appreciation is expressed to the IAL for permission to reproduce this and subsequent listings.
15 This list is based on an original questionnaire prepared by Johnny Sung, from the University of Leicester and a Visiting Fellow at the IAL Singapore.
16 The list in Figure 4 is based on the work of Dr Johnny Sung for the IAL Singapore.
18 CIPD factsheet, E-learning: progress and prospects, accessible at www.cipd.co.uk/subjects/lrnanddev/elearning/elearnprog.htm
19 The map can be accessed at: www.cipd.co.uk/hr-profession-map/professional-areas
References


CIPD factsheet, E-learning: progress and prospects, accessible at www.cipd.co.uk/subjects/lnrmanddev/elearning/elearnprog.htm

CIPD factsheet, Evaluating learning and development, accessible at www.cipd.co.uk/subjects/lnrmanddev/evaluation/evatrain.htm

CIPD HR Profession Map accessible at www.cipd.co.uk/hr-profession-map/default.htm


Wikipedia is a free encyclopaedia; it can be accessed at http://en.wikipedia.org/wiki/Main_Page
CIPD factsheets

The following are available as a free resource on the CIPD website www.cipd.co.uk. These articles were all last accessed on 17 August 2010.

Action learning
www.cipd.co.uk/subjects/lrnanddev/general/actionlearning.htm

Aligning learning to the needs of the organisation
www.cipd.co.uk/subjects/lrnanddev/general/alignlearner.htm

Coaching and mentoring
www.cipd.co.uk/subjects/lrnanddev/coachmntor/coaching.htm

Competency and competency frameworks
www.cipd.co.uk/subjects/perfmangmt/competnces/comptfrmwk.htm

Costing and benchmarking learning and development
www.cipd.co.uk/subjects/lrnanddev/general/cstngtrain.htm

Development planning for individual employees
www.cipd.co.uk/subjects/lrnanddev/general/devplng.htm

E-learning: progress and prospects
www.cipd.co.uk/subjects/lrnanddev/elearning/elearnprog.htm

Evaluating learning and development
www.cipd.co.uk/subjects/lrnanddev/evaluation/evatrain.htm

HR business partnering
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International management development: an overview
www.cipd.co.uk/subjects/intlhr/intmandev.htm

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Talent management: an overview
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The people and performance link
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Appendices

Summary I: Models for learning and development professionals

Learning & Development 2020: Exploring the future of workplace learning
Phase I report: Trends, scenarios and emerging conclusions

TJ, formerly known as Training Journal, is a respected UK publication aimed at learning and development professionals. Further information on the journal and the range of TJ activities can be found by visiting www.trainingjournal.com

In 2008 TJ initiated a project that aimed to explore how learning and development in organisations might develop over five to ten years, focusing particularly on the implications for learning and development practitioners. The first phase of the project was undertaken by Paul Fairhurst of the Institute for Employment Studies (IES), an independent research consultancy operating in the area of public policy and organisational human resources. The findings and conclusions of the first phase of the project are set out in Learning & Development 2020: Exploring the future of workplace learning (Phase I report: Trends, scenarios and emerging conclusions).

In this first phase of the project the trends and developments that might impact the L&D world were identified. These trends were described under 36 headings grouped into four areas: society; work & business; brain & mind; technology. Three possible future scenarios for learning and development were identified. After workshops and discussion around these trends and scenarios the following ‘emerging conclusions’ were put forward.

L&D is changing and will continue to change. The scenarios describe some very different possible futures and yet some key themes emerged which reflect the changes as being evolutionary rather than revolutionary, continuing travel along the path that some organisations have already started.

• The importance of continuous, informal, social learning will continue to grow and will require L&D professionals to become competent in creating the conditions for this to occur.

• Individuals will increasingly look for ways for their informal learning to be recognised (accredited) to demonstrate their value in the market.

• The skill of learning will become increasingly important and people will need to be helped to become even more effective at learning for themselves and with others.

• While individuals will find ways to learn for themselves, the role of the line manager in focusing and reinforcing learning will continue to be crucial.

• New technologies are not just ways of delivering the same content differently; they open up new opportunities for people to learn.

• The boundaries between L&D and OD will blur further as learning is embedded into the way organisations work.

• There will be a shift in balance of the L&D professional’s skillset towards greater business understanding, change management, organisation development and use of new technologies.
Summary II: Models for learning and development professionals

CIPD’s Supporting, accelerating and directing learning: implications for trainers (Research Insight)

The Chartered Institute of Personnel and Development (CIPD) is Europe’s largest HR development professional body, with more than 135,000 members. It commissions, produces and publishes a wide range of research across all aspects of human resource. Full information can be found on its website at www.cipd.co.uk.

In November 2005 the CIPD created a virtual trainers’ network. It was established to explore the role of training and learning in today’s service-led and knowledge-driven economy. The network considered the changing context in which learning, training and development takes place and the alignment of learning to strategic priorities, participating in a series of online polls and designated discussion threads. Over the ensuing three-year period the CIPD also published significant research on the role of line managers, the value of learning, and several editions of their annual Learning and Development survey.

The findings and conclusions of this overall research were published in 2008 as: Supporting, accelerating and directing learning: implications for trainers (see www.cipd.co.uk/subjects/lnanddev/general/_sadlrng.htm). The following was offered as the role definition for the trainer:

Supporting, accelerating and directing learning interventions that meet organisational needs and are appropriate to the learner and the context.

As a consequence of the research the following observations were offered on what good practice trainers are doing. Here is a summary.

- Showing a clear understanding of the business drivers in their organisation.
- Helping their organisations add value and move up the value chain.
- Establishing a clear vision and strategy for people development.
- Involving others and engaging stakeholders in a transparent way.
- Having both a good overview of what is needed to advance in the long term and also of the short-term priorities.
- Using processes and techniques – for example, coaching or e-learning – appropriately.
- Applying wider metrics, beyond return on investment, to demonstrate value.
- Understanding the starting point and prior receptiveness of the learner and adjusting interventions accordingly.
Summary III: Models for learning and development professionals

Research findings from the Teaching & Learning Research Programme (TLRP)

The Teaching & Learning research Programme was funded by the UK Economic and Social Research Council. Full details of the TLRP programme are set out in www.tlrp.org which also gives access to the publications.

The most relevant summary of the TLRP work is contained in: Higher skills development at work: A Commentary by the Teaching and Learning Programme. This was written by Professor Alan Brown of Warwick University and draws on a higher skills development workshop held at the University of Warwick in March 2009 (see www.tlrp.org/pub/documents/HigherSkillsComm.pdf).

The commentary emphasises the importance of context: the need to understand how people develop and apply higher level skills, knowledge and understanding in different work contexts:

Learning at work is related to the productive system of the company, the organisation of work, and the type and range of activities at work.

Higher skills development at work must be seen in the context in which the individual is working and a wide range of factors must be taken into account. Importantly:

One interesting finding is that the development of higher skills at work is often not the prime focus of the activity undertaken, which might be to solve a problem or to improve performance in some way.

The social nature of learning at work is stressed:

Working and learning are social activities. Work relationships, interactions and learning influence opportunities for the development of work-relevant skills knowledge and understanding.

Higher skills development depends partly on the environment (‘whether work offers an expansive learning environment’). It depends also on the individual’s response and the extent to which they are self-directed in terms of taking advantage of learning opportunities: ‘people vary in their self-awareness about their goals, aspirations, motivation, personality, inter-personal skills and resilience’ and ‘willingness to engage in a wide range of activities such as asking questions; getting information; locating key resource people; listening and observing; learning from mistakes; giving and receiving feedback; trying things out; independent study; and working for a qualification’.
Finally the ‘Higher skills development at work’ commentary presents the TLRP’s ten evidence-informed principles. These were generated from research on schools and further and higher education, and adapted to fit the context of higher skills development at work. They are discussed fully in the commentary and are listed below.

- Skills development policy should have twin foci upon enhancing both individual development and organisational performance.
- Effective higher skills development depends on the learning and development of those who support the learning of others in the workplace.
- Informal learning is central to higher skills development at work.
- Higher skills development at work involves both individual and social processes and outcomes.
- Higher skills development at work promotes the active engagement of the individual as a learner.
- Effective higher skills development at work is dependent upon the timeliness and quality of feedback and support.
- Effective higher skills development at work requires learning to be systematically developed.
- Effective development at work recognises the importance of prior experience and learning.
- Effective higher skills development at work engages with expertise and varied forms of learning.
- Effective higher skills development at work should engage with individual’s broader life goals.