



# **PERSONALISING LEARNING – the new imperative for Management Development**

## **SYNOPSIS**

The article makes the case for moving beyond standardised and customised development to approaches that personalise – allowing individual managers to co-create their learning designs. Research evidence on the approaches used by various organisations is presented. Following this there is an outline of the way these organisations provided personalised development programmes.

## **EFFECTIVE PERSONALISATION OF LEARNING**

### **WHY PERSONALISE?**

Prahalad and Ramaswamy (2000) point out that ‘It is important to distinguish personalisation from customisation. Customisation assumes that the manufacturer will design a product to suit a customer’s needs..... Personalisation, on the other hand, is about the customer becoming a co-creator of the content of their experience.’ (P. 84-5). The tenor of their thesis is that personalising is becoming a more serious requirement of business and that people are looking more and more to take charge of their own lives with choices that directly suit them.

In management development the prevailing metaphor to describe customising has been that of ‘tailoring’. Here is a recent example of this: ‘...the process of tailoring in management development means far more than topping and tailing standard off-the-shelf materials or techniques. It means at the very least using materials that relate directly to the industry or stage of development of the client; or, in most cases, designing specific materials and teaching methods that build on the current circumstances participants find themselves in.’ (Syrett and Lammimam, P. 23).

This statement has a number of debatable assumptions in it. First there is the assumption that management development is centrally concerned with management teaching and training. This flies in the face of all the available research evidence which shows that formal training and education play a minimal role in the development of managers (see, for example, Burgoyne and Reynolds, 1997; Cunningham, 1999; Eraut et al, 1998). So one problem with standard assumptions about tailoring tends to be with the mindset of modifying standardised offerings. And such standardised offerings have concentrated on training and education.

Customising, in this way of thinking, is about creating a specific training course for a particular organisation but assuming that all learners in that organisation are pretty much the same – with the same needs and the same ways in which they learn. ‘Tailoring’ then becomes an odd metaphor. It’s a Henry Ford approach – ‘you can have any clothes you like so long as it’s a suit in this standard size - and it’s black!’

Personalising implies that the person can not only choose the clothes that suit them but also have a hand in their creation. We know that this is possible in real life situations. To switch from the metaphor of tailoring we can look at food. There is a world of difference between pre-packaged TV dinners and food cooked with your own input to its creation.

When we switch from these analogies to learning itself we are confronted with the situation that people personalise even if organisations try to impose standardised training. The fact is that trainers can put people through all sorts of clever exercises but ultimately managers will learn and apply what they choose to learn and apply. Of course such choices are influenced by others. However research going back to the 1950's (e.g. Fleishman, 1953) shows that the person's manager and the culture of the organisation are more likely to be powerful influencers than trainers or academics.

We suggest that there may be a need for a progression from standardised offerings to customised ones to those that are personalised. Thus we could postulate a move from standardised courses that provide no 'tailoring' to customised courses designed for a particular organisation. And we could further consider how a move to personalising would leave behind an over emphasis on courses and provide learning experiences suited to each individual manager.

In the next section we will offer some examples of organisations that have taken a personalised route for their management development. Each of these cases has been subject to rigorous evaluation and the results demonstrate the necessity for organisations to take seriously the need for personalisation.

## **CASES**

The cases quoted here are all to be found in Cunningham et al (2000). This latter collection has within it a range of cases and three are very briefly summarised below. The approach in each organisation was to use Self Managed Learning. A key feature of all the programmes was the use of Strategic Learning Contracts where each manager identified, planned and negotiated their own learning programme. In addition to this each person was a member of a learning group of five or six managers with an adviser. The groups typically met every five weeks over a period of about nine months.

Each case study follows the same format, which will hopefully assist the reader:

**CONTEXT: A brief outline of the organisation and the circumstances which led to the programme.**

**AIMS: An indication of the organisation's aims and objectives in sponsoring the programme.**

**EVALUATION AND ACHIEVEMENTS: An outline of the methods that were used to evaluate the programme and summary points on the achievements.**

**QUOTES: Pertinent quotes from participants or sponsors emanating from qualitative research.**

## **CASE STUDY ONE: Organisational change in PPP healthcare**

### **CONTEXT**

The organisation is a healthcare and financial services organisation, founded in 1940. In December 1997, the company was bought by Guardian Royal Exchange, which has in turn been bought by the AXA group.

The programme began in September 1996 during a period of considerable organisational change. Self Managed Learning (SML) was specifically chosen as a management development strategy to facilitate that change.

The programme was provided initially for 120 senior managers and was later extended to other levels of the business.

### **AIMS**

- To promote continuous development
- To link personal development to the needs of the business
- To encourage individual ownership of personal development
- To facilitate cross functional support and networking
- To promote a cost effective approach to development throughout PPP healthcare

### **EVALUATION AND ACHIEVEMENTS**

#### **Evaluation Methods**

- In-depth interviews with senior managers
- Focus groups with participants
- Interviews with key stakeholders including the Chief Executive Officer
- Questionnaire based survey of participants
- Documentary evidence

The research was conducted by Rosie Serpis, HR Manager within PPP healthcare, for her Masters degree in Employment Strategy (Serpis, 1998).

#### **Achievements**

- Increase in confidence of senior managers to take action
- Created culture of working collaboratively and inclusively
- Many measurable improvements to business performance – e.g. new product development; fresh approach to market research; radical new way of creating and documenting Customer Service processes
- Management development is now business focussed, flexible, able to meet the changing needs of individuals and the organisation, fun, innovative and cost effective
- Created a life-long capability of managing own learning

## QUOTES

Peter Owen, (Chief Executive Officer of PPP healthcare at the time of the programme), when asked what he felt the benefits to the organisation had been, stated:

*"I think there are six:*

- 1. The obvious networking benefit of people finding out what's going on elsewhere.*
- 2. This may not be an obvious one, but I think it's apparent from where I sit, I think there's been a huge increase in self-confidence in the managers who take part in it. It may be a bit unconscious for them...but I think it's quite important.*
- 3. As a way of, a method of, working. So not just the networking benefits of simply knowing what's going on in other parts of the business, but of understanding that where we ultimately want to get to is that you don't need a dictat coming down from the Policy Group, that, actually, managers see that we need to do this, to get together and get things done...there's no sitting back as a spectator and waiting to be told... They [managers] see from that the power of just getting on and doing things.*
- 4. Another important benefit is the challenging side of it. This sort of process also gives people confidence in understanding that, in terms of our values, they have the right to be heard as managers, to say what they think, openly and not subversively.*
- 5. In terms of an organisation that is in an environment where change is going to be a constant bedfellow, then, clearly, this type of working is also conducive to that fresh approach all the time.*
- 6. There is the hard learning bit, what it enables people to do through the Strategic Learning Contract...where they need to learn new skills or gain a new qualification.*

*These are the things I see and applaud from it and I don't really see any negatives: the talking shop is a potential negative, but I haven't seen any evidence."*

## **CASE STUDY TWO: Lifelong Learning in Ericsson Limited**

### **CONTEXT**

Ericsson Limited is the UK subsidiary of the Sweden based Ericsson Group. Ericsson is the world leader in digital mobile networks with over 40% of the market. There are 5,500 employees based at 5 sites in the UK.

The approach was chosen to facilitate a change of culture to lifelong learning in line with the organisation's strategic direction and local business strategy. It was initiated and run by senior line managers.

The programmes covered 114 participants across two divisions.

The approach now forms part of Ericsson's learning and development strategy in the UK. It is already an integral part of the company's two-year graduate scheme.

### **AIMS**

To quote from the Ericsson Group Strategic Direction:

- 'We have an environment of continuous learning and development that fosters lifelong learning for our employees
- We have people who proactively take initiatives
- Ericsson shall have a Research and Development organisation set for speed and flexibility.'

Local Objectives were:

- 'To encourage people to take charge of their own development so that we would avoid the situation where people were waiting passively for others to organise courses or learning activities
- To get the most out of the time that people were investing in learning activities
- To provide an approach to learning that people would enjoy, was collaborative, highly visible and where people would take a creative approach to identifying sources of learning.'

### **EVALUATION AND ACHIEVEMENTS**

#### **Evaluation Methods**

- Focus groups with participants
- Questionnaire based survey of participants

The research was conducted by Robert Lines, a Senior Line Manager within Ericsson, for his MBA (1998).

## **Achievements**

- People working with others to pursue learning goals: 88% of respondents stated that learning group members had helped to generate ideas and solutions to problems they had encountered in their learning goals.
- People viewing their careers in terms of learning and development.
- People taking a proactive approach to their future direction.

Evidence of a change in approach to responsibility for learning.

- People focussing on longer-term goals and objectives as well as 'day to day' fire-fighting.
- Increased networking, coaching and support between people.

## **QUOTES**

From a Project Manager:

*"... it (SML) will build a different type of culture where people are responsible for their own futures as opposed to thinking 'My manager knows what I need to learn – I'll just wait for him or her to let me know'. 'Empowerment', that's the word I was looking for."*

From a Software Designer:

*"I was surprised it worked. In the early days I couldn't see how a bunch of people from different areas would be able to help other people learning different things. But I guess with SML you don't always need to be told the answer. Sometimes people suggest something that leads you to the solution indirectly. Often just the opportunity to discuss an issue makes you realise that you knew the answer all the time."*

## **CASE STUDY THREE - Sainsbury's Personnel Development Programme**

### **CONTEXT**

Some comments from Nigel Broome, Director HR - Operations in J Sainsbury and Judith Evans, HR Director for Homebase may set the context:

*'As a company we needed to move away from a rather over directive style of management which had inhibited creativity and innovation.'*

*'With over 120,000 employees Personnel/HR was (and is) a vitally important activity in the company. However by the early 1990's it was apparent that the function had not responded adequately to the needs of the business in a number of areas. When we surveyed managers around the business they told us a number of important things about the changes they wanted to see.'*

### **AIMS**

The programme was designed to facilitate a major shift in the way the function and all 700 personnel professionals worked. Nine aims (success criteria) were identified. These included aims such as: -

- 'Personnel professionals have the confidence to challenge line managers, and the professional competence to address issues.
- The function, and personnel professionals in it, are more respected, valued by line and seen as a 'one-stop-shop'.
- Managers and personnel professionals work in partnership to solve business problems.
- Line managers are more actively involved in training, selection, coaching, managing absence, etc.'

### **EVALUATION AND ACHIEVEMENTS**

#### **Evaluation methods**

Sainsbury's carried out an internal evaluation. This evaluation study included

- questionnaires to participants,
- interviews with a sample of participants
- interviews and focus groups with line managers of participants.

Quantitative measures were devised against all nine aims of the programme. A ten-point scale was created and the mean scores prior to the programme were around five.

## **Achievements**

After the programme all scores against the nine aims had improved significantly, the mean being around 7.5 i.e. a 2.5 average shift in a positive direction. This was in addition to all the personal learning that had taken place.

## **QUOTES**

Nigel Broome and Judith Evans summarised their own conclusions as follows:

*'The value of the programme has been enormous to the company in times of change and turbulence in our markets. The principles of Self Managed Learning, such as using real work as a basis of learning, have underpinned a major change management programme for Directors. Without the success of the Personnel Development Programme we would not have been able to pursue that and other new projects.'*

## MAKING PERSONALISATION WORK

The three cases outlined here are discussed in detail in Cunningham et al (2000) as are further researched cases such as Arun District Council and organisations outside the UK (one chapter being on programmes in Finland). Other programmes that have been thoroughly evaluated include those in Cable and Wireless (Webster, 1995), Shell (Broscomb, 1994), British Airways (Cooper, 1988), London Borough of Lewisham (Jackson, 1993), BBC and the NHS (Cunningham, 1999) and a Consortium Programme for companies such as Barclays Bank, EMI and Norwich Union (Bennett, 2000).

What these research studies show is that not only is personalisation feasible but desirable. However we need to say a little more about what personalisation means in our context (i.e. of management development). One problem with earlier attempts at personalising was the disconnection of individual learning from organisational realities. This issue especially bedevilled self development approaches in the 1980's.

The main problem with excessive individualism was to confuse the right of managers to decide *for* themselves (about their learning) with the distorted notion of deciding *by* one's self. Deciding *by* one's self can result in narrow self-centredness. Deciding *for* one's self needs to be carried out in a context and with the support and challenge of others, (Kegan, 1994). Managing is a social process and therefore Self Managed Learning is carried out in the context of a manager's real life relationships.

Two SML structures help to create a 'deciding *for* yourself' environment (as opposed to a 'deciding *by* yourself' environment). First there is the learning group. This regular meeting of peers ensures that managers have to work on their learning in the context of these relationships. Secondly the use of Strategic Learning Contracts provides a basis for each manager to negotiate their learning plans and actions with others. The process is, therefore, one of 'negotiation' not of purely selfish decision making.

In conclusion, it may be worth referring back to the three cases outlined above. In each of these organisations it was clear that managers increased their level of co-operation and collaboration with others, not just in their learning groups but also through improved networking. The research evidence shows that personalisation through Self Managed Learning meets the requirements of a programme that responds to individual differences while also connecting to organisational needs. This feature also shows how the approach enhances both Human Capital and Social Capital in the organisation.

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