

Learning and development

This chapter is about how organizations make arrangements for appropriate learning and development to take place by various means, including training. It is divided into three sections: learning, development and training.

The formulation and implementation of learning and development strategies is dealt with in Chapter 41.

LEARNING

Defined

Learning is the process by which a person acquires and develops new knowledge, skills, capabilities and attitudes. As Williams (1998) defined it, 'learning is goal directed, it is based on experience, it impacts behaviour and cognition, and the changes brought about are relatively stable'. Honey and Mumford (1996) explained that: 'Learning has happened when people can demonstrate that they know something that they did not know before (insights, realizations as well as facts) and when they can do something they could not do before (skills)'. Mumford and Gold (2004) emphasized that: 'Learning is both a process and an outcome concerned with knowledge, skills and insight.'

There are four types of learning:

1. *Instrumental learning* – learning how to do the job better once the basic standard of performance has been attained. Helped by learning on the job.
2. *Cognitive learning* – outcomes based on the enhancement of knowledge and understanding.
3. *Affective learning* – outcomes based on the development of attitudes or feelings rather than knowledge.
4. *Self-reflective learning* – developing new patterns of understanding, thinking and behaving and therefore creating new knowledge (Harrison, 2005).

Aim

The aim of the learning policies and programmes of an organization is to provide the skilled, knowledgeable and competent people required to meet its present and future needs. To achieve this aim it is necessary to ensure that learners are ready to learn, understand what they need to know and be able to do, and are able to take responsibility for their learning by making good use of the learning resources available, including the support and guidance of their line managers.

Philosophy

The philosophy of learning was expressed by Sloman (2003a) as follows:

Interventions and activities that are intended to improve knowledge and skills will increasingly focus on the learner. Emphasis will shift to the individual learner (or team). And he or she will be encouraged to take more responsibility for his or her learning. Efforts will be made to develop a climate that supports effective and appropriate learning. Such interventions and activities will form part of an integrated approach to creating competitive advantage through people in the organization.

Learning and development

Learning is a continuous process that not only enhances existing capabilities but also leads to the development of the skills, knowledge and attitudes that prepare people for enlarged or higher-level responsibilities in the future.

Learning and training

The encouragement of learning makes use of a process model that is concerned with facilitating the learning activities of individuals and providing learning resources for

them to use. Conversely, the provision of training involves the use of a content model, which means deciding in advance the knowledge and skills that need to be enhanced by training, planning the programme, deciding on training methods and presenting the content in a logical sequence through various forms of instruction. A distinction is made by Sloman (2003a) between learning that 'lies within the domain of the individual' and training that 'lies within the domain of the organization'. Today, the approach is to focus on individual learning and ensure that it takes place when required – 'just-for-you' and 'just-in-time' learning.

Conditions for effective learning

The conditions required for learning to be effective, as derived from the learning theories and concepts described in Chapter 37, are set out below.

Motivation to learn

Individuals must be motivated to learn. They should be aware that their present level of knowledge, skill or competence, or their existing attitude or behaviour, need to be developed or improved if they are to perform their work to their own and to others' satisfaction. They must, therefore, have a clear picture of the behaviour they should adopt. To be motivated, learners must gain satisfaction from learning. They are most capable of learning if it satisfies one or more of their needs. Conversely, the best learning programmes can fail if they are not seen as useful by those undertaking them.

Self-directed learning

Self-directed or self-managed learning involves encouraging individuals to take responsibility for their own learning needs, either to improve performance in their present job or to develop their potential and satisfy their career aspirations. It can be based on a process of recording achievement and action planning that involves individuals reviewing what they have learnt, what they have achieved, what their goals are, how they are going to achieve those goals and what new learning they need to acquire. The learning programme can be 'self-paced' in the sense that learners can decide for themselves up to a point the rate at which they work and are encouraged to measure their own progress and adjust the programme accordingly.

Self-directed learning is based on the principle that people learn and retain more if they find things out for themselves. But they still need to be given guidance on what to look for and help in finding it. Learners have to be encouraged to define, with whatever help they may require, what they need to know to perform their job

effectively. They need to be provided with guidance on where they can get the material or information that will help them to learn and how to make good use of it. Personal development plans, as described later in this chapter, can provide a framework for this process. They also need support from their manager and the organization with the provision of coaching, mentoring and learning facilities, including e-learning.

Self-directed learning can also be described as self-reflective learning (Mezirow, 1985), which is the kind of learning that involves encouraging individuals to develop new patterns of understanding, thinking and behaving. It is a process which was described by Argyris (1992) as double-loop learning, which is based on an examination of the root causes of problems and can create a new learning loop that goes far deeper than the traditional learning loop provided by 'instrumental learning' (ie learning how to perform a job better) which tends only to focus on the surface symptoms of a problem.

Learning goals, direction and feedback

Effective learning is more likely to be achieved if learners have learning goals. They should have targets and standards of performance that they find acceptable and achievable and can use to judge their own progress. They should be encouraged and helped to set their own goals. The learning outcome must be clear.

Learners need a sense of direction and feedback on how they are doing. They should receive reinforcement of correct behaviour. Self-motivated individuals may provide much of this for themselves, but it is necessary to have a learning facilitator, eg a mentor, who is available to encourage and help when necessary. Learners usually need to know quickly how well they are doing. In a prolonged programme, intermediate steps are required in which learning can be reinforced. The content of the learning programme may therefore need to be broken down into small modules or elements, each with an objective.

Learning methods

The learning goals and the particular needs and learning style of the learner should indicate what learning method or methods should be used. Specific goals and understanding of individual needs help to select appropriate learning methods. It should not be assumed that a single learning method will do. A combination of methods is likely to produce better results. The use of a variety of methods, as long as they are all appropriate, helps learning by engaging the interest of learners.

Learning is 'personal, subjective and inseparable from activity' (Reynolds, 2004). It is an active, not a passive process. As far as possible, therefore, the learning process

should be active, although this may take more time than passive methods in which the learner is at the receiving end of some form of training, eg instruction. The more complex the skill to be mastered, the more the learning methods need to be active. Learning requires time to assimilate, test and accept. This time should be provided in the learning programme.

Levels of learning

Different levels of learning exist and these need different methods and take different times. At the simplest level, learning requires direct physical responses, memorization and basic conditioning. At a higher level, learning involves adapting existing knowledge or skill to a new task or environment. At the next level, learning becomes a complex process when principles are identified in a range of practices or actions, when a series of isolated tasks have to be integrated, or when the process is about developing interpersonal skills. The most complex form of learning takes place when learning is concerned with the values and attitudes of people and groups. This is not only the most complex area, but also the most difficult.

Blending learning

Blending different but appropriate types of learning produces the best results.

Spectrum of learning – from informal to formal

There is a spectrum of learning as defined by Watkins and Marsick (1993), from informal to formal, as follows:

- unanticipated experiences and encounters that result in learning as an incidental by-product, which may or may not be consciously recognized;
- new job assignments and participation in teams, or other job-related challenges that provide for learning and self-development;
- self-initiated and self-planned experiences, including the use of media and seeking out a coach or mentor;
- total quality or improvement groups/active learning designed to promote continuous learning for continuous improvement;
- providing a framework for learning associated with personal development planning or career planning;
- the combination of less-structured with structured opportunities to learn from these experiences;
- designed programmes of mentoring, coaching or workplace learning;
- formal training programmes or courses involving instruction.

Informal learning

Informal learning is experiential learning. Most learning does not take place in formal training programmes. People can learn 70 per cent of what they know about their job informally, through processes not structured or sponsored by the organization.

A study by Eraut *et al* (1998) established that in organizations adopting a learner-centred perspective, formal education and training provided only a small part of what was learnt at work. Most of the learning described to the researchers was non-formal, neither clearly specified nor planned. It arose naturally from the challenges of work. Effective learning was, however, dependent on the employees' confidence, motivation and capability. Some formal training to develop skills (especially induction training) was usually provided, but learning from experience and other people at work predominated. Reynolds (2004) notes that:

The simple act of observing more experienced colleagues can accelerate learning; conversing, swapping stories, co-operating on tasks and offering mutual support deepen and solidify the process... This kind of learning – often very informal in nature – is thought to be vastly more effective in building proficiency than more formalized training methods.

The advantages of informal learning are that:

- learning efforts are relevant and focused in the immediate environment;
- understanding can be achieved in incremental steps rather than in indigestible chunks;
- learners define how they will gain the knowledge they need – formal learning is more packaged;
- learners can readily put their learning into practice.

The disadvantages are that:

- it may be left to chance – some people will benefit, some won't;
- it can be unplanned and unsystematic, which means that it will not necessarily satisfy individual or organizational learning needs;
- learners may simply pick up bad habits.

Workplace learning

Informal learning occurs in the workplace and, as explained by Stern and Sommerlad (1999), this takes three forms:

1. *The workshop as a site for learning.* In this case, learning and working are spatially separated with some form of structured learning activity occurring off or near the job. This may be in a company training centre or a 'training island' on the shop floor where the production process is reproduced for trainees.
2. *The workplace as a learning environment.* In this approach, the workplace itself becomes an environment for learning. Various on-the-job training activities take place, which are structured to different degrees. Learning is intentional and planned, aimed at training employees by supporting, structuring and monitoring their learning.
3. *Learning and working are inextricably mixed.* In this case, learning is informal. It becomes an everyday part of the job and is built into routine tasks. Workers develop skills, knowledge and understanding through dealing with the challenges posed by the work. This can be described as continuous learning. As Zuboff (1988) put it: 'Learning is not something that requires time out from being engaged in productive activity; learning is the heart of productive activity.'

Formal learning

Formal learning is planned and systematic and involves the use of structured training programmes consisting of instruction and practice.

Informal and formal learning compared

A comparison between informal and formal learning is shown in Table 38.1.

Table 38.1 Characteristics of formal and informal learning

Informal	Formal
Highly relevant to individual needs	Relevant to some, not so relevant to others
Learners learn according to need	All learners learn the same thing
May be small gap between current and target knowledge	May be variable gaps between current and target knowledge
Learner decides how learning will occur	Trainer decides how learning will occur
Immediate applicability ('Just-in-time' learning)	Variable times, often distant
Learning readily transferable	Problems may occur in transferring learning to the workplace
Occurs in work setting	Often occurs in non-work setting

Learning programmes

Learning programmes are concerned with:

- defining the objectives of learning;
- creating an environment in which effective learning can take place (a learning culture);
- making use of blended learning approaches;
- adopting a systematic, planned and balanced approach to the delivery of learning;
- identifying learning and development needs;
- satisfying these needs by delivering blended different learning, development and training processes including e-learning;
- evaluating the effectiveness of those processes.

As mentioned earlier, learning is a continuous process and much of it arises from day-to-day experience in the workplace. But this learning may be haphazard, inappropriate and fail to meet the short and longer-term needs of either the individual or the organization. A *laissez-faire* approach by the organization could be highly unsatisfactory if it does not ensure that these needs are met by whatever means are available. Experiential learning will be enhanced if the climate in the organization is supportive, and an important aspect of a learning and development strategy will be creating such a climate, as discussed later in this chapter. But it will also be extended if individuals are helped to identify their own learning needs and provided with guidance on how they can be met using various means. As described below, the learning programme can concentrate on making the best use of workplace learning opportunities, ensuring that people are aware of what they need to learn and providing them with encouragement and support, agreeing learning contracts, and enhancing learning through coaching or mentoring. These activities should be used as part of a blended approach, which is discussed below.

Making the most of learning opportunities

Learning opportunities occur all the time and the challenge is to ensure that people make the most of them. Some will need no encouragement. Others will have to be helped. Line managers or team leaders have a crucial role in encouraging and supporting learning. They can do this within the relatively formal setting of a performance and development review. Or, better still, they can consciously promote learning from day-to-day events when they discuss how a task might be done, when they analyse information on outcomes with individuals, and when they ask

individuals to tell them what they have learnt from an event and what it tells them about any additional learning required. But it is necessary to ensure that line managers are aware of the need to promote learning and have the will and the skills to do it.

Identifying and meeting learning needs

It is necessary to ensure that people are aware of what they need to learn to carry out their present role and to develop in the future. This starts with induction and involves the specification of learning programmes and the planning of learning events, with an emphasis on self-directed learning accompanied by a blend of other learning approaches as appropriate. It continues with performance and development reviews that identify learning needs and define how they will be met, again by self-managed learning as far as possible but making use of coaching, mentoring and formal training courses as required.

Learning contract

A learning contract is a formal agreement between the manager and the individual on what learning needs to take place, the objectives of such learning and what part the individual, the manager, the training department or a mentor will play in ensuring that learning happens. The partners to the contract agree on how the objectives will be achieved and their respective roles. It will spell out learning programmes and indicate what coaching, mentoring and formal training activities should be carried out. It is, in effect, a blueprint for learning. Learning contracts can be part of a personal development planning process, as described later in this chapter.

Coaching

The Industrial Society (1999) defines coaching as: 'The art of facilitating the enhanced performance, learning and development of others.' It takes the form of a personal (usually one-to-one) on-the-job approach to helping people develop their skills and levels of competence. Hirsh and Carter (2002) state that coaching is aimed at the rapid improvement of skills, behaviour and performance, usually for the present job. A structured and purposeful dialogue is at the heart of coaching. The coach uses feedback and brings an objective perspective. They noted that the boundaries between what a coach, mentor, counsellor or organization development consultant do are inevitably blurred – they all use similar skills.

The need for coaching may arise from formal or informal performance reviews but opportunities for coaching will emerge during normal day-to-day activities. Coaching as part of the normal process of management consists of:

- making people aware of how well they are performing by, for example, asking them questions to establish the extent to which they have thought through what they are doing;
- controlled delegation – ensuring that individuals not only know what is expected of them but also understand what they need to know and be able to do to complete the task satisfactorily; this gives managers an opportunity to provide guidance at the outset – guidance at a later stage may be seen as interference;
- using whatever situations may arise as opportunities to promote learning;
- encouraging people to look at higher-level problems and how they would tackle them.

A common framework used by coaches is the GROW model:

‘G’ is for the goal of coaching, which needs to be expressed in specific measurable terms that represent a meaningful step towards future development.

‘R’ is for the reality check – the process of eliciting as full a description as possible of what the person being coached needs to learn.

‘O’ is for option generation – the identification of as many solutions and actions as possible.

‘W’ is for wrapping up – when the coach ensures that the individual being coached is committed to action.

Coaching will be most effective when the coach understands that his or her role is to help people to learn and individuals are motivated to learn. They should be aware that their present level of knowledge or skill or their behaviour needs to be improved if they are going to perform their work satisfactorily. Individuals should be given guidance on what they should be learning and feedback on how they are doing and, because learning is an active not a passive process, they should be actively involved with their coach who should be constructive, building on strengths and experience.

Coaching may be informal but it has to be planned. It is not simply checking from time to time on what people are doing and then advising them on how to do it better. Nor is it occasionally telling people where they have gone wrong and throwing in a lecture for good measure. As far as possible, coaching should take place within the framework of a general plan of the areas and direction in which individuals will benefit from further development. Coaching plans can and should be incorporated into the personal development plans set out in a performance agreement.

Coaching should provide motivation, structure and effective feedback if managers have the required skills and commitment. As coaches, managers believe that people

can succeed, that they can contribute to their success and that they can identify what people need to be able to do to improve their performance.

Mentoring

Mentoring is the process of using specially selected and trained individuals to provide guidance, pragmatic advice and continuing support, which will help the person or persons allocated to them to learn and develop. It has been defined by Clutterbuck (2004) as: 'Off-line help from one person to another in making significant transitions in knowledge, work or thinking.' Hirsh and Carter (2002) suggest that mentors prepare individuals to perform better in the future and groom them for higher and greater things, ie career advancement.

Mentoring can be defined as a method of helping people to learn, as distinct from coaching, which is a relatively directive means of increasing people's competence. It involves learning on the job, which must always be the best way of acquiring the particular skills and knowledge the job holder needs. Mentoring also complements formal training by providing those who benefit from it with individual guidance from experienced managers who are 'wise in the ways of the organization'.

Mentors provide people with:

- advice in drawing up self-development programmes or learning contracts;
- general help with learning programmes;
- guidance on how to acquire the necessary knowledge and skills to do a new job;
- advice on dealing with any administrative, technical or people problems individuals meet, especially in the early stages of their careers;
- information on 'the way things are done around here' – the corporate culture and its manifestations in the shape of core values and organizational behaviour (management style);
- coaching in specific skills;
- help in tackling projects – not by doing it for them, but by pointing them in the right direction: helping people to help themselves;
- a parental figure with whom individuals can discuss their aspirations and concerns and who will lend a sympathetic ear to their problems.

There are no standard mentoring procedures, although it is essential to select mentors who are likely to adopt the right non-directive but supportive help to the person or persons they are dealing with. They must then be carefully briefed and trained in their role.

Blended learning

Blended learning is defined by Sloman (2003b) as: 'An approach to training design that involves the use of a combination of delivery methods and in some cases learning methodology.' Schramm (2001) describes it as: 'The combination of different modes of delivery that take into account the learner's environment, motivation and learning styles with different theoretical approaches. This creates a multi-layered and richer palette of learning methods.' Blended learning aims to make the different parts of the learning mix complementary and mutually supportive in meeting learning needs.

Recognition of the need to blend learning avoids the pitfall of over-reliance on one approach. It means using conventional instruction, e-learning and self-directed learning as well as experiential learning. The aim is to inspire and motivate learners over extended periods of time and through an appropriate mix of inputs and outputs, individual and collaborative study, formal and informal processes, and a blend of face-to-face and virtual contact. Focus on the learner is achieved by taking special care to provide them with support and guidance from their managers, coaches and mentors and to complement this with the provision of e-learning material.

A blended programme might be planned for an individual using a mix of self-managed learning activities defined in a personal development plan, e-learning facilities, group action learning activities, coaching or mentoring, and instruction provided in an in-company course or externally. Generic training for groups of people might include e-learning, planned instruction programmes, planned experience, and selected external courses. Within a training course a complementary mix of different training activities might take place; for example a skills development course for managers or team leaders might include some instruction on basic principles but much more time would be spent on case studies, simulations, role-playing and other exercises.

DEVELOPMENT

Development is an unfolding process that enables people to progress from a present state of understanding and capability to a future state in which higher-level skills, knowledge and competencies are required. It takes the form of learning activities that prepare people to exercise wider or increased responsibilities. It does not concentrate on improving performance in the present job. Development has been defined by Harrison (2000) as: 'Learning experiences of any kind, whereby individuals and groups acquire enhanced knowledge, skills, values or behaviours. Its

outcomes unfold through time, rather than immediately, and they tend to be long-lasting.'

In development programmes there is an emphasis on personal development planning and planned learning from experience. Use may be made of a 'corporate university'. Development can also focus on managers and take the form of action learning or outdoor learning. To maximize the impact of development a balanced approach is necessary, using a mix of learning methods as described in the previous section of this chapter.

Personal development planning

Personal development planning is carried out by individuals with guidance, encouragement and help from their managers as required. A personal development plan sets out the actions people propose to take to learn and to develop themselves. They take responsibility for formulating and implementing the plan, but they receive support from the organization and their managers in doing so. The purpose is to provide what Tamkin *et al* (1995) call a 'self-organized learning framework'.

Personal development planning consists of the following stages, as modelled in Figure 38.1:

1. *Analyse current situation and development needs.* This can be done as part of a performance management process.
2. *Set goals.* These could include improving performance in the current job, improving or acquiring skills, extending relevant knowledge, developing specified areas of competence, moving across or upwards in the organization, preparing for changes in the current role.
3. *Prepare action plan.* The action plan sets out what needs to be done and how it will be done under headings such as outcomes expected (learning objectives), the development activities, the responsibility for development (what individuals are expected to do and the support they will get from their manager, the HR department or other people), and timing. A variety of activities tuned to individual needs should be included in the plan, for example: observing what others do, project work, planned use of e-learning programmes and internal learning resource centres, working with a mentor, coaching by the line manager or team leader, experience in new tasks, guided reading, special assignments and action learning. Formal training to develop knowledge and skills may be part of the plan but it is not the most important part.
4. *Implement.* Take action as planned.

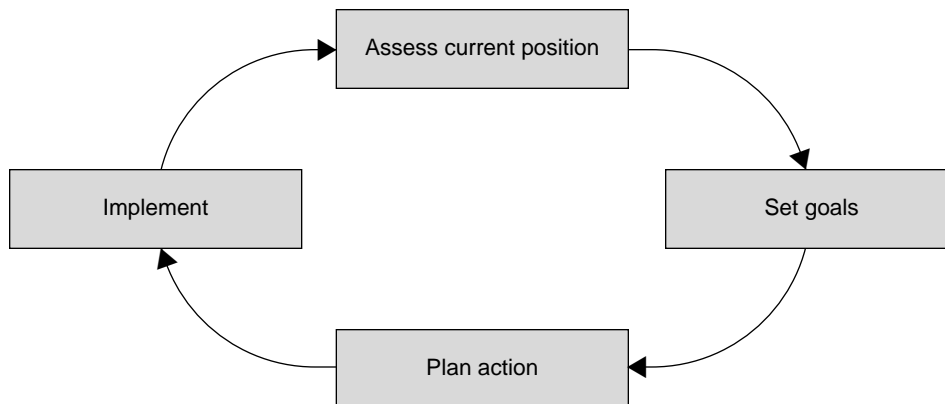


Figure 38.1 Stages in preparing and implementing a personal development plan

The plan can be expressed in the form of a *learning contract* as described earlier in this chapter.

Planned experience

Experiential learning can take place by planning a sequence of experience that meets a learning specification for acquiring knowledge and skills that will prepare people to take on increased responsibilities in the same or different functions and occupations. A programme is drawn up which sets down what people are expected to learn in each department or job in which they are given experience. This should spell out what they are expected to discover for themselves. A suitable person should be available to see that people in a development programme are given the right experience and opportunity to learn, and arrangements should be made to check progress. A good way of stimulating people to find out for themselves is to provide them with a list of questions to answer. It is essential, however, to follow up each segment of experience to check what has been learnt and, if necessary, modify the programme.

Planned experience used to be known as 'job rotation', but was often an inefficient and frustrating method of acquiring additional knowledge and skills. What has sometimes been referred to as the 'Cook's tour' method of moving trainees from department to department has incurred much justified criticism because of the time wasted by them in locations where no one knew what to do with them, or cared.

Corporate university

A corporate university is an institution set up and run by an organization, often with outside help, in which education and learning takes place. As Carter *et al* (2002) point out:

The term 'corporate university' is interpreted in different ways. For some, it is specific and refers to the use of academic terminology to describe and raise the status of training and development and, perhaps, also implies a relationship with one or more 'real' conventional universities who co-design or accredit the company's programmes. For others, the term is interpreted more broadly as an umbrella that describes the creation and marketing of internal brands for all the learning and development opportunities an organization provides.

For example, BAe Systems operates a virtual university, which has a strategic partnership policy that allows them to co-design programmes with the help of conventional universities. In contrast, Lloyds TSB runs its training function just as though it were a university, with faculties for each development area, the aim being to align training and development with business strategy and use the concept as an internal brand, letting employees know that it is investing in them.

Action learning

Action learning, as developed by Revans (1971), is a method of helping managers develop their talents by exposing them to real problems. They are required to analyse them, formulate recommendations, and then take action. It accords with the belief that managers learn best by doing rather than being taught.

In 1989 Revans produced the following formula to describe his concept: L (learning) = P (programmed learning) + Q (questioning, insight). He suggests that the concept is based on six assumptions:

1. Experienced managers have a huge curiosity to know how other managers work.
2. We learn not as much when we are motivated to learn, as when we are motivated to learn something.
3. Learning about oneself is threatening and is resisted if it tends to change one's self-image. However, it is possible to reduce the external threat to a level that no longer acts as a total barrier to learning about oneself.
4. People learn only when they do something, and they learn more the more responsible they feel the task to be.

5. Learning is deepest when it involves the whole person – mind, values, body, emotions.
6. The learner knows better than anyone else what he or she has learnt. Nobody else has much chance of knowing.

A typical action learning programme brings together a group, or 'set' of four or five managers to solve the problem. They help and learn from each other, but an external consultant, or 'set adviser', sits in with them regularly. The project may last several months, and the set meets frequently, possibly one day a week. The adviser helps the members of the set to learn from one another and clarifies the process of action learning. This process involves change embedded in the web of relationships called 'the client system'. The web comprises at least three separate networks: the power network, the information network, and the motivational network (this is what Revans means by 'who can, who knows, and who cares'). The forces for change are already there within the client system and it is the adviser's role to point out the dynamics of this system as the work of diagnosis and implementation proceeds.

The group or set has to manage the project like any other project, deciding on objectives, planning resources, initiating action and monitoring progress. But all the time, with the help of their adviser, they are learning about the management processes involved as they actually happen.

Outdoor learning

Outdoor learning involves exposing individuals to various 'Outward Bound' type activities: sailing, mountain walking, rock climbing, canoeing, caving, etc. It means placing participants, operating in teams, under pressure to carry out physical activities that are completely unfamiliar to them. The rationale is that these tests are paradigms of the sort of challenges people have to meet at work, but their unfamiliar nature means that they can learn more about how they act under pressure as team leaders or team members. Outdoor learning involves a facilitator helping participants to learn individually and collectively from their experiences.

Impact of development – a balanced approach

A balanced approach is required to maximize the impact of development on engagement and performance. This is illustrated in Figure 38.2, adapted from Walker (2004).

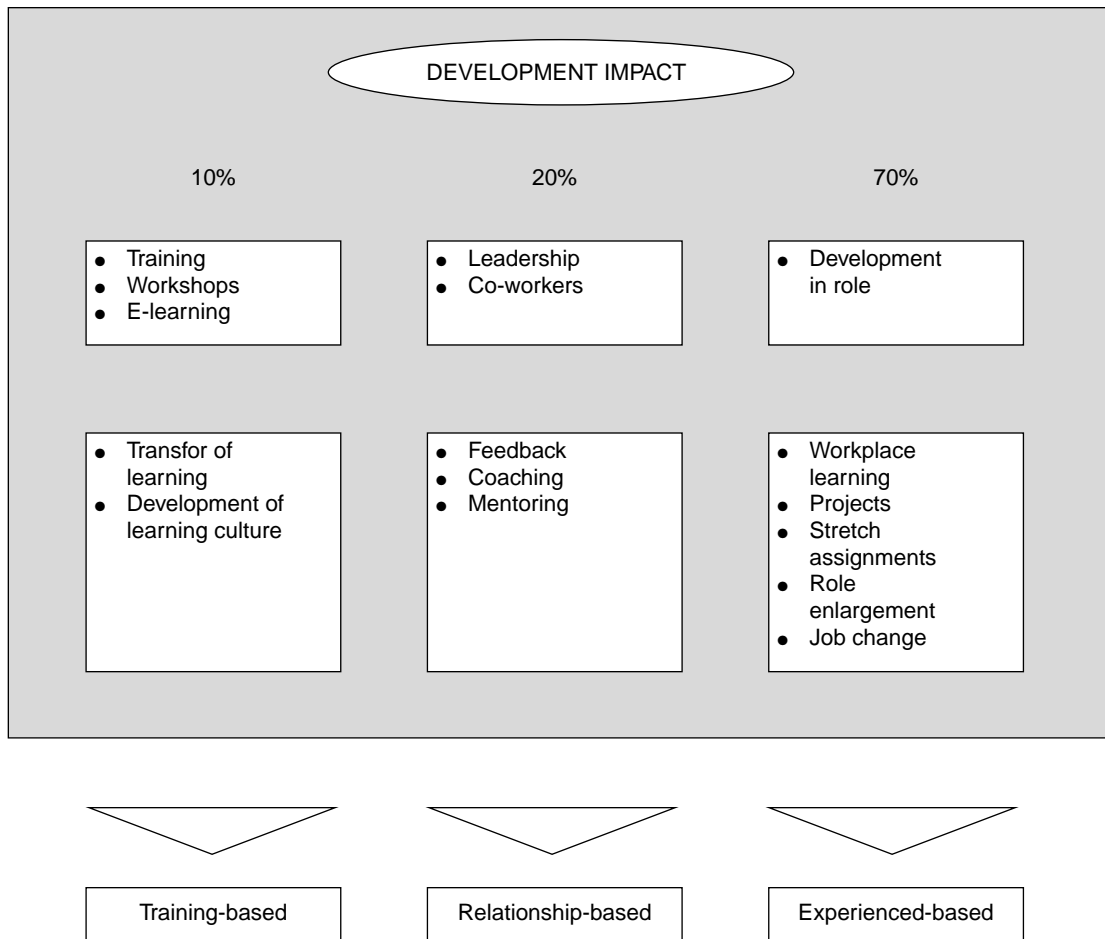


Figure 38.2 Impact of development

TRAINING

Training is the use of systematic and planned instruction activities to promote learning. The approach can be summarized in the phrase ‘learner-based training’. It involves the use of formal processes to impart knowledge and help people to acquire the skills necessary for them to perform their jobs satisfactorily. It is described as one of several responses an organization can undertake to promote learning.

As Reynolds (2004) points out, training has a complementary role to play in accelerating learning: ‘It should be reserved for situations that justify a more directed,

expert-led approach rather than viewing it as a comprehensive and all-pervasive people development solution.' He also commented that the conventional training model has a tendency to 'emphasize subject-specific knowledge, rather than trying to build core learning abilities'.

The justification for training

Formal training is indeed only one of the ways of ensuring that learning takes place, but it can be justified when:

- the work requires skills that are best developed by formal instruction;
- different skills are required by a number of people, which have to be developed quickly to meet new demands and cannot be acquired by relying on experience;
- the tasks to be carried out are so specialized or complex that people are unlikely to master them on their own initiative at a reasonable speed;
- critical information must be imparted to employees to ensure they meet their responsibilities;
- a learning need common to a number of people has to be met, which can readily be dealt with in a training programme, for example induction, essential IT skills, communication skills.

Transferring training

It has been argued (Reynolds, 2004) that: 'The transfer of expertise by outside experts is risky since their design is often removed from the context in which work is created.' This is a fundamental problem and applies equally to internally run training courses where what has been taught can be difficult for people to apply in the entirely different circumstances in their workplace. Training can seem to be remote from reality and the skills and knowledge acquired can appear to be irrelevant. This particularly applies to management or supervisory training, but even the manual skills learnt in a training centre may be difficult to transfer.

This problem can be tackled by making the training as relevant and realistic as possible, anticipating and dealing with any potential transfer difficulties. Individuals are more likely to apply learning when they do not find it too difficult, believe what they learnt is relevant, useful and transferable, are supported by line managers, have job autonomy, believe in themselves and are committed and engaged. Transfer is also more likely if systematic training and 'just-in-time training' approaches are used, as described below.

Systematic training

Training should be systematic in that it is specifically designed, planned and implemented to meet defined needs. It is provided by people who know how to train and the impact of training is carefully evaluated. The concept was originally developed for the industrial training boards in the 1960s and consists of a simple four-stage model, as illustrated in Figure 38.3:

1. Identify training needs.
2. Decide what sort of training is required to satisfy these needs.
3. Use experienced and trained trainers to implement training.
4. Follow up and evaluate training to ensure that it is effective.

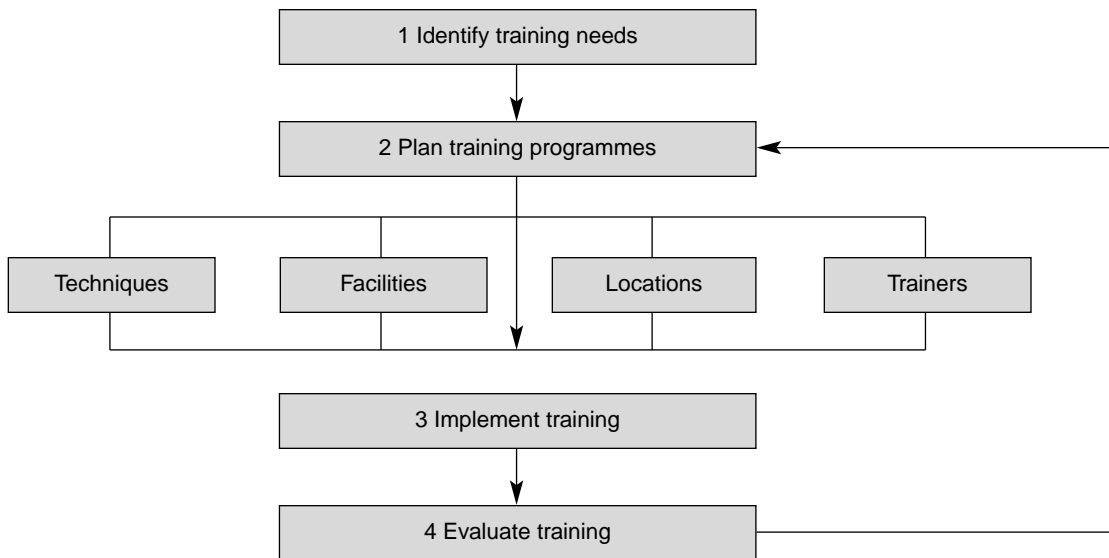


Figure 38.3 Systematic training model

Just-in-time training

Just-in-time training is training that is closely linked to the pressing and relevant needs of people by its association with immediate or imminent work activities. It is delivered as close as possible to the time when the activity is taking place. The training will be based on an identification of the latest requirements, priorities and plans of the participants, who will be briefed on the live situations in which their learning has to be applied. The training programme will take account of any transfer

issues and aim to ensure that what is taught is seen to be applicable in the current work situation.

Types of training

Training programmes or events can be concerned with any of the following:

- manual skills;
- IT skills;
- team leader or supervisory training;
- management training;
- interpersonal skills, eg leadership, teambuilding, group dynamics, neuro-linguistic programming;
- personal skills, eg assertiveness, coaching, communicating, time management;
- training in organizational procedures or practices, eg induction, health and safety, performance management, equal opportunity or managing diversity policy and practice.

Effective training practices

Effective training uses the systematic approach defined above with an emphasis on skills analysis. The purpose of the training should be clearly defined in terms of the 'criterion behaviour' required as a result of training, and the 'terminal behaviour' expected. The latter can be expressed as a statement along the lines of: 'On completing this training the participant will be able to...'. Defining criterion and terminal behaviours will provide the basis for evaluation, which is an essential element in the achievement of successful training.

The content of the training should be related to the work contexts of the participants. Ideally, their work should be made a central feature of the subject matter. Every opportunity should be taken to embed learning at work.

The training techniques used should be appropriate to the purpose of the course and to the characteristics of participants – their jobs, learning needs, previous experience, level of knowledge and skills, and how receptive they will be to being taught (motivated to learn). A blend of different techniques should be used where appropriate. It is particularly important in management, supervisory and interpersonal skills training to provide ample time for participation and active learning through discussion, case studies and simulations. Lectures should form a minor part of the course. Good instructional techniques as described below should be used in manual skills training.

Training techniques

Instruction

Job instruction techniques should be based on skills analysis and learning theory, as discussed in Chapters 13 and 37. The sequence of instruction should follow six stages:

1. Preparation for each instruction period means that the trainer must have a plan for presenting the subject matter and using appropriate teaching methods, visual aids and demonstration aids. It also means preparing trainees for the instruction that is to follow. They should want to learn. They must perceive that the learning will be relevant and useful to them personally. They should be encouraged to take pride in their job and to appreciate the satisfaction that comes from skilled performance.
2. Presentation should consist of a combination of telling and showing – explanation and demonstration.
3. Explanation should be as simple and direct as possible: the trainer explains briefly the ground to be covered and what to look for. He or she makes the maximum use of films, charts, diagrams and other visual aids. The aim should be to teach first things first and then proceed from the known to the unknown, the simple to the complex, the concrete to the abstract, the general to the particular, the observation to reasoning, and the whole to the parts and back to the whole again.
4. Demonstration is an essential stage in instruction, especially when the skill to be learnt is mainly a ‘doing’ skill. Demonstration takes place in three steps:
 - The complete operation is shown at normal speed to show the trainee how the task should be carried out eventually.
 - The operation is demonstrated slowly and in correct sequence, element by element, to indicate clearly what is done and the order in which each task is carried out.
 - The operation is demonstrated again slowly, at least two or three times, to stress the how, when and why of successive movements.
5. Practice consists of the learner imitating the instructor and then constantly repeating the operation under guidance. The aim is to reach the target level of performance for each element of the total task, but the instructor must constantly strive to develop coordinated and integrated performance, that is, the smooth combination of the separate elements of the task into a whole job pattern.
6. Follow-up continues during the training period for all the time required by the learner to reach a level of performance equal to that of the normal experienced

worker in terms of quality, speed and attention to safety. During the follow-up stage, the learner will continue to need help with particularly difficult tasks or to overcome temporary setbacks that result in a deterioration of performance. The instructor may have to repeat the presentation for the elements and supervise practice more closely until the trainee regains confidence or masters the task.

Lecture

A lecture is a talk with little or no participation except a question-and-answer session at the end. It is used to transfer information to an audience with controlled content and timing. When the audience is large, there may be no alternative to a 'straight lecture' if there is no scope to break it up into discussion groups.

The effectiveness of a lecture depends on the ability of the speaker to present material with the judicious use of visual aids. But there are several limits on the amount an inert audience can absorb. However effective the speaker, it is unlikely that more than 20 per cent of what was said will be remembered at the end of the day. And after a week, all will be forgotten unless the listeners have put some of their learning into practice. For maximum effectiveness, the lecture must never be longer than 30 or 40 minutes; it must not contain too much information (if the speaker can convey three new ideas that more than a half of the audience understands and remembers, the lecture will have been successful); it must reinforce learning with appropriate visual aids (but not too many); and it must clearly indicate the action that should be taken to make use of the material.

Discussion

The objectives of using discussion techniques are to:

- get the audience to participate actively in learning;
- give people an opportunity of learning from the experience of others;
- help people to gain understanding of other points of view;
- develop powers of self-expression.

The aim of the trainer should be to guide the group's thinking. He or she may, therefore, be more concerned with shaping attitudes than imparting new knowledge. The trainer has unobtrusively to stimulate people to talk, guide the discussion along predetermined lines (there must be a plan and an ultimate objective), and provide interim summaries and a final summary.

The following techniques can be used to get active participation:

- Ask for contributions by direct questions.
- Use open-ended questions that will stimulate thought.
- Check understanding; make sure that everyone is following the argument.
- Encourage participation by providing support rather than criticism.
- Prevent domination by individual members of the group by bringing in other people and asking cross-reference questions.
- Avoid dominating the group yourself. The leader's job is to guide the discussion, maintain control and summarize from time to time. If necessary, 'reflect' opinions expressed by individuals back to the group to make sure they find the answer for themselves. The leader's job is to help them reach a conclusion, not to do it for them.
- Maintain control – ensure that the discussion is progressing along the right lines towards a firm conclusion.

Case study

A case study is a history or description of an event or set of circumstances that is analysed by trainees in order to diagnose the causes of a problem and work out how to solve it. Case studies are mainly used in courses for managers and team leaders because they are based on the belief that managerial competence and understanding can best be achieved through the study and discussion of real events.

Case studies should aim to promote enquiry, the exchange of ideas, and the analysis of experience in order that the trainees can discover underlying principles that the case study is designed to illustrate. They are not light relief. Nor are they a means of reducing the load on the instructor. Trainers have to work hard to define the learning points that must come out of each case, and they must work even harder to ensure that these points do emerge.

The danger of case studies is that they are often perceived by trainees to be irrelevant to their needs, even if based on fact. Consequently, the analysis is superficial and the situation is unrealistic. It is the trainer's job to avoid these dangers by ensuring that the participants are not allowed to get away with half-baked comments. Trainers have to challenge assumptions and force people to justify their reasoning. Above all, they have to seize every chance to draw out the principles they want to illustrate from the discussion and to get the group to see how these are relevant to their own working situation.

Role-playing

In role-playing, the participants act out a situation by assuming the roles of the characters involved. The situation will be one in which there is interaction between two

people or within a group. It should be specially prepared with briefs written for each participant explaining the situation and, broadly, their role in it. Alternatively, role-playing could emerge naturally from a case study when the trainees are asked to test their solution by playing the parts of those concerned.

Role-playing is used to give managers, team leaders or sales representatives practice in dealing with face-to-face situations such as interviewing, conducting a performance review meeting, counselling, coaching, dealing with a grievance, selling, leading a group or running a meeting. It develops interactive skills and gives people insight into the way in which people behave and feel.

The technique of 'role reversal', in which a pair playing, say, a manager and a team leader run through the case and then exchange roles and repeat it, gives extra insight into the feelings involved and the skills required.

Role-playing enables trainees to get expert advice and constructive criticism from the trainer and their colleagues in a protected training situation. It can help to increase confidence as well as developing skills in handling people. The main difficulties are either that trainees are embarrassed or that they do not take the exercise seriously and overplay their parts.

Simulation

Simulation is a training technique that combines case studies and role-playing to obtain the maximum amount of realism in classroom training. The aim is to facilitate the transfer of what has been learnt off the job to on-the-job behaviour by reproducing, in the training room, situations that are as close as possible to real life. Trainees are thus given the opportunity to practise behaviour in conditions identical to or at least very similar to those they will meet when they complete the course.

Group exercises

In a group exercise the trainees examine problems and develop solutions to them as a group. The problem may be a case study or it could be one entirely unrelated to everyday work. The aims of an exercise of this kind are to give members practice in working together and to obtain insight into the way in which groups behave in tackling problems and arriving at decisions.

Group exercises can be used as part of a team-building programme and to develop interactive skills. They can be combined with other techniques such as the discovery method, encouraging participants to find out things for themselves and work out the techniques and skills they need to use.