

Appendix D

Learning and Development Activities and Methods

The following learning and development activities are described in this appendix:

action learning	case study
coaching	corporate university
discussion	group exercises
instruction	lecture
mentoring	modern apprenticeship
outdoor learning	role playing
simulation	

Action learning

Action learning, as developed by Revans (1989) 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. Revans produced the following formula to describe his concept: L (learning) = P (programmed learning) + Q (questioning, insight).

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.

Case study

A case study is a history or description of an event or set of circumstances that is analysed by trainees 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, 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 so that the trainees can discover the underlying principles 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.

Coaching

Coaching is a personal (usually one-to-one) on-the-job approach to helping people develop their skills and levels of competence. A structured and purposeful dialogue is at the heart of coaching. The coach uses feedback and brings an objective perspective. 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.

Corporate university

A corporate university is an institution set up and run by an organization, often with outside help, in which education and learning take 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 it 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 is 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.

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 facilitator is to guide the group's thinking. He or she may, therefore, be more concerned with shaping attitudes than imparting new knowledge. The facilitator 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.

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.

Instruction

Job instruction techniques should be based on skills analysis and learning theory, as discussed in Chapters 26 and 43. 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, 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 set-backs 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 and there is no scope to break it up into discussion groups, there may be no alternative to a 'straight lecture'.

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 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. 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 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.

Mentoring

Mentoring is the process of using specially selected and trained individuals to provide guidance, pragmatic advice and continuing support that will help the person or persons allocated to them to learn and develop. Mentors prepare individuals to perform better in the future and groom them for higher and greater things, ie career advancement.

Mentoring is a method of helping people to learn and develop, as distinct from coaching which is a relatively directive means of increasing people's competence. Mentoring promotes learning

on the job, which is always 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 approach to the person or persons they are dealing with. They must then be carefully briefed and trained in their role.

Modern apprenticeship

Modern apprenticeships were originally introduced by the government as a means of developing key skills. Their main features are:

- open to those aged 16–24;
- provide alternate on-the-job and off-the job experience and training;
- linked to NVQ qualifications;
- frameworks developed by Skills Sector Councils and adapted to meet local needs;
- possible to progress to further or higher education.

The problems with modern apprenticeships have included variability between sectors, concentration on traditional sectors, the number of apprentices is not increasing, concern about the NVQ framework, and poor quality trainers and assessors.

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.

Role playing

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. 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.

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.

References

- Carter A, Hirsh, W and Aston, J (2002) *Resourcing the Training and Development Function*, Report No 390, Institute of Employment Studies, Brighton
- Revans, R W (1989) *Action Learning*, Blond and Briggs, London