Learning in the Workplace

Report on the EFMD Workplace Learning
Special Interest Group
Charles Jennings, July 2011

Four overall themes steer the SIG activities:

• Innovation
• Efficiency
• Integration
• organisation

Outputs include

• a manager checklist to develop effective strategies and practices to promote workplace learning
• 18 strategies for engaging non-learning professionals in workplace learning
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**Background**

**The Rise of Workplace Learning**

In recent years, there has been increasing interest in the application of informal and workplace learning. Organisations have been exploring new approaches for employee development that are not tied to the formal structured methods around classes, courses and curricula. Equally, they are reviving old approaches built around apprenticeship and workplace practices.

In part, this revival has been driven by economic elements. Pressures to lower training costs and reduce budgets for travel have been a major consideration. But it has also been driven by the realisation that most adult learning occurs not through formal methods but through experience, practice, conversations and reflection. People learn mainly through doing rather than through knowing.

The increased interest in workplace learning has not been aimed at simply replacing formal methods, but at better exploiting the limited time and budgets available to organisations so they can realise increased performance improvement, greater employee development opportunities and improved flexibility in the provision of learning opportunities to the workforce.

Additionally, the focus on workplace learning has not been confined to any particular business sector or to specific groups of employees (individual contributors, first line managers etc.), but is being adopted across a wide range of industries, agencies and government departments.

**The Rationale for Workplace Learning**

The greater interest in workplace learning has followed the publication of research and survey data over the past 10 years that indicates its effectiveness. There is now considerable evidence that most adult learning related to work takes place in the workplace rather in the classroom. Loewenstein and Spletzer reported in their report for the US Bureau of Labor Statistics titled ‘Formal and Informal Training: Evidence from the NLSY’ as long ago as 1996 that:

“people learn 70% of what they know about their jobs informally”

Other studies have validated this.
A CapitalWorks study reported a breakdown in methods of learning. Their findings indicated that:

“Approximately 75% of the skills employees use on the job were learned informally through discussions with co-workers, self-study, mentoring by managers and similar methods. 25% were gained from formal training”

Michael Lombardo and Robert Eichinger of the Center for Creative Leadership in North Carolina published data on how managers learn in their 1996 book The Career Architect Development Planner. They found that:

“Lessons learned by successful and effective managers are roughly
70% from tough jobs
20% from people (mostly the boss)
10% from courses and reading”

Although the exact percentages vary from study to study, the overwhelming evidence indicates that workplace learning is extremely important in workforce development.

**EFMD and Workplace Learning**

EFMD Corporate Services realised early that the increasing interest and activity in workplace learning required focus and support. In ensuring that services to corporate members are both leading-edge and relevant, and following an EFMD Corporate Services strategic review in 2009, a decision was taken to launch a number of Special Interest Groups (SIGs). The SIG initiative is part of the EFMD’s ‘Excellence in Corporate Learning’ strategy.

The SIGs have been planned to help address key issues on the minds of the EFMD corporate members and to provide peer-groups with opportunities to share experiences and build solutions to common challenges.

A particular point that should be noted is that, the SIGs have been designed to be problem-driven and to address specific issues facing members. The format of each SIG is constructed to allow members to mobilise the collective intelligence of the community and to take the learning and outputs back into their own organisations.

The EFMD provides facilitators to support each SIG. These facilitators work with the participating organisations to set the agenda, build a roadmap and maintain momentum during the progress of the group.
An outline of the structure, process and format of the SIG structure is shown below.

**Special Interest Group Structure, Process and Format**

![SIG format diagram](image)

**Fig 1:** structure and function of the SIG model.

The facilitator works with one EFMD member organisation to identify the key problem areas to be addressed and to identify potential peer organisations. The structure is then agreed, along with subject matter expert input and a high-level roadmap. The programme is then developed. The programme activities include a number of face-to-face and virtual workshops and peer meetings together with one or two Corporate Advisory Seminars designed to align and integrate with SIG activities during the course of the group. Following the closure of the group, outputs (such as this report) are disseminated to the wider EFMD membership.

**The Workplace Learning SIG**

The Workplace Learning Special Interest Group was established in Q2 of 2009 to address the challenge of maximising the benefits of new technologies and tools (including web 2.0) to support workplace learning.
Its focus was to identify the key levers, tools and solutions that can help to build sustainable employee capability beyond the confines of formal training and development courses and programmes.

Participating organisations wanted to address approaches that could be used in a number of areas, including:

- The use of new informal learning methods and technologies emerging from Web 2.0 developments such as social software and performance support solutions.
- The engagement of subject matter experts as originators of learning content.
- Closer alignment with line managers to develop informal coaching and mentoring.
- Integrating experiential and informal learning with formal methods.
- Building best practice through distributed working groups.
- Peer learning and informal coaching approaches.
- Technology-based delivery and consumption of learning content and other related areas.

The Participating Organisations
Organisations that participated in the Workplace learning SIG were drawn from across the range of business sectors – Financial Services, Healthcare, Industrial Goods, Consumer Goods, and Services. They included:

Allianz, The BBC, Coca-Cola, Eli Lilly, Ergo, L’Oréal, GSK, Holcim, Toyota, MAN, MLP, Novo Nordisk

One of the key success factors for the initiative was that participants worked in an open and collaborative manner. All were willing to share their successes and failures and learn from each other. Open sharing under Chatham House Rules\(^1\) provided a rich environment for sharing and learning. The facilitator for the group was the former CLO of Thomson Reuters, Charles Jennings.

The Key Challenges
The overall challenges and outputs agreed by the participating organisations were:

1. To identify the key levers, tools and solutions that can help to build sustainable employee capability **beyond the confines of formal training and development courses and programmes**.

\(^1\)When a meeting is held under the Chatham House Rule, participants are free to use the information received, but neither the identity nor the affiliation of the speaker(s), nor that of any other participant, may be revealed outside the meeting.
2. To work on key issues in workplace learning and to **develop solutions that participants can implement in their own context.**

Participating organisations agreed that they were each looking for practical help to extend their use of workplace learning.

**The Themes**

Four themes were agreed for the SIG:

1. **Innovation:** L&D innovation, agility and technologies required to support workplace learning
2. **Efficiency:** Workplace learning in difficult economic times, the challenge of increasing business impact using workplace learning
3. **Integration:** Models and approaches for integrating formal learning and workplace learning
4. **Organisation:** Challenges of structuring Training/L&D organisations to support workplace learning

**The Key Questions**

**Issues** addressed during the peer workshops were focused on the four areas above and included **questions** such as:

**INNOVATION:**

i. *How do we best develop a culture of innovation in our training/L&D organisation? What are the implications? What are the potential challenges? How can we align our training community with a workplace learning vision?*

ii. *What are the best approaches to introducing and organising new technologies - especially Web 2.0 social learning and media - into training/L&D provision?*

iii. *How can we 'bring learning to all'? - from Gen Y to senior leaders and managers, from Europe to China to Brazil, and across working domains?*

**EFFICIENCY**

i. *Can we build a toolkit of practical, low cost workplace learning options to achieve more efficient training/L&D in difficult economic times? How can we design learning activities linked with business strategic challenges?*
ii. What are best-practice approaches to measuring workplace learning? Can we develop a set of roadmaps and tools for participating organisations to use?

iii. How do we achieve efficiency gains through workplace learning where training/L&D is decentralised across multiple geographies and business units?

iv. What can we do to support growing companies (e.g. India, China) with huge numbers of shop floor and supervisor level employees that need to be trained and with still rather low acceptance of new technologies such as eLearning?

INTEGRATION

i. What should be the balance between self-directed workplace learning and formal training/learning? Are there best-practice examples? Can we develop a set of roadmaps for implementing a balanced offering?

ii. How do we encourage people to share experiences and best-practice in distributed groups? How can we utilise workplace learning to achieve this?

iii. What timeframes are realistic to move to a ‘holistic’ approach to supporting our stakeholders with an integrated L&D function and set of offerings?

iv. How can we transfer learning from classroom to the workplace leading to sustainable changes in behaviour?

v. How do we identify best-practices showing effective on the job development? How can we build self-reliant learning in the workplace driven (and/or led) by managers and enabled by HR?

ORGANISATION

i. How do we re-orientate training/L&D organisation and their staff to deliver value to our businesses and build a 'reputable presence' in supporting workplace learning - both efficiently and effectively? Can we produce a 'pack' of tools and templates to analyse existing state and match against best practice examples?

ii. What competencies and capabilities are required to deliver workplace learning services? Can we get expert input and examples of relevant competency frameworks that we could implement?

iii. What are the best accountability-based organisational designs for training/L&D to foster workplace learning? How would we reorganise on a business partner model?
iv. How do we exploit worldwide synergies? Can we assemble research and best-practice examples?

v. What are the best governance models for training/L&D to link with workplace learning support? Can we build a set of examples?

vi. How can we get maximum efficiencies with a global decentralised training structure?

The Peer Workshops
Six workshops were held for the Workplace Learning SIG between October 2009 and November 2010. Four of the workshops were face-to-face events held at the EFMD offices in Brussels. Two workshops were virtual and held in webinar format so participants could attend without the expense of travel or eating into valuable time.

The workshops addressed a wide range of workplace learning issues. Most of the work was carried out between the participating organisations, but external experts were also invited to contribute to discussions and provide input.

Workshop Topics
Each workshop took a specific topic for analysis, sharing and co-creation of approaches and tools. Topics included:

- Integrating and managing Informal learning
- Supporting workplace learning with technology
- Strategies for engaging managers to support workplace learning
- Peer & collaborative workplace learning

External Specialist Input
The following specific areas were addressed in peer workshops. In some cases with participation from external experts:

a. Access to Research Resources for Workplace Learning: Richard Hollingsworth of the Emerald Group ran a session explaining the EFMD Research Link resource. Research Link is provided by EFMD together with Emerald Publishing, and was made available to SIG members. This resource gives access to a vast library of distilled articles, case studies and research articles from the world’s top companies and business schools and has a wide range of workplace learning materials.

b. The Value of Structured Work-based Learning: Professor Carol Costley of the Institute of Work-Based Learning at Middlesex University in London provided input to the SIG on how work-based learning can add value to formal development programmes by extending into the workplace.
c. **Workplace Learning in Difficult Times**: Dr Martin Moehrle, former CLO of Deutsche Bank, shared his experiences with the SIG of how workplace learning fits with HR value creation.

d. **Using Social Media to Support Workplace Learning**: Jane Hart, Director of the Centre for Learning and Performance Technologies (which includes one of the world’s most-visited learning technologies websites), shared her experiences during one of the virtual SIG workshops of how organisations are using social media to support workplace learning and the ‘top tools’ being used for social and workplace learning.

**The Corporate Advisory Seminars**
Two Corporate Advisory Seminars (CAS) were run in conjunction with Workplace Learning SIG workshops. These provided an opportunity for SIG participants to gain knowledge from external experts and share experiences and discuss challenges with a wider group of organisations. External experts provided insight and presented case studies at these CAS events.

Topics addressed in the CAS events linked with the Workplace Learning SIG included:

a. **Workplace learning and the 70:20:10 Model**: This model has been widely implemented by organisations over the past ten years to help widen focus beyond the classroom and formal development and to include workplace learning, informal learning and social learning in a structured mix of development activities. Many organisations, including global companies such as Nike, Maersk, PriceWaterhouseCoopers, L’Oréal, Goldman Sachs, Hewlett Packard, Nokia and American Express have implemented the 70:20:10 model in their strategy. Charles Jennings, former CLO at Reuters presented this case study.

b. **The British Telecom Dare2Share initiative**: British Telecom has implemented a ‘Youtube-like’ platform for its engineers. Together with Accenture, BT built the tool in response to finding that 78% of BT employees preferred to learn from each other rather than from formal learning environments. Dare2Share provides video podcasts where employees can create and upload short learning nuggets to their colleagues in either video or audio format. Dare2Share supports workplace development by rapidly capturing and spreading learning throughout the organisation in the form of podcasts, discussion
threads, blogs, RSS feeds and other traditional knowledge assets (documents, courses and portals). Peter Butler, CLO at BT presented this case study.

c. **Global Deployment of Innovative Learning and The Power of Conversations**: CrossKnowledge, a Paris-based learning solutions company that brings world-class experts to its clients, is embarked on the integration of Web 2.0 tools and approaches with its activities. Steve Fiehl one of the founders and Managing Director of CrossKnowledge, presented case studies from organisations such as Lexmark and Saipem explaining how CrossKnowledge is exploiting the power of conversations in their development activities.

d. **How Managers Learn**: GoodPractice, an Edinburgh, Scotland based company carries out leading-edge work in performance support and works with its clients helping support leaders and managers through workplace learning. Peter Casebow, the managing director of GoodPractice, presented the results of a survey that found the learning activities of managers draw on informal and social learning opportunities in the workplace far more frequently than on formal learning.

e. **Knowledge Maturity in Organisations**: Professor Ronald Maier of Leopold-Franzens-Universität, Innsbruck, Austria ran a CAS session focused on the evolution of knowledge management and personal knowledge management and the need for agility, knowledge sharing and workplace collaboration in successful organisations.

### Case Studies

During the SIG workshops each organisation presented case studies of workplace learning activities and initiatives within their organisation.

The nature of the workplace learning initiatives that organisations shared varied widely from the BBC Academy, and the associated MOO social learning environment, that is available to all BBC employees to the NOVO NORDISK Peer Coaching approach for learning through stories and reflection by bringing together coach, coachee, facilitator and external 'witnesses' in a social grouping for development and the TOYOTA OJD (On-Job Development) approach that supports the company’s 'Toyota Way' mindset and practice in the workplace. Considerable learning was obtained from discussion of case study material.
Outputs
The key outputs and participant benefits include:

Sharing Experiences and Best Practice

1. **Case studies** proved a rich source of data and experiences for conversation and sharing. Each participating organisation provided various case studies focused on aspects of workplace learning

2. **Peer Social Media Survey** – a survey of participating organisations’ use of social media for learning was carried out, focussing on areas such as [a] Learning Communities; [b] Professional Networks; [c] Tools; [d] Management of social media for employee development

Toolkits

1. Toolkit and guidelines for building **Communities of Practice**

2. Toolkit and approach for carrying out **Social Network Analysis** to help employees build networks and improve learning through others

3. **Manager’s Checklist** of 25 actions to support workplace learning

4. Other **tools, dashboards** and **scorecards** in use by participating organisations were explained and shared

Strategies

1. Assembly of 21 alternative approaches used by participating organisations to support **strategies for engaging non-learning professionals in workplace learning**

2. **Model for analysing challenges and barriers** for engaging managers in workplace learning, and alternative strategies and options for addressing them

3. **Performance Consulting approaches** to support learning professionals analyse business problems and identify workplace learning options

Sample Findings and Outputs
Below is a selection of models, checklists, strategies and activities that were developed by SIG members during the workshops:
1. Manager Checklist for Workplace Learning

One tool developed as part of the Workplace Learning SIG was a checklist for managers.

The rationale behind construction of the checklist is that there are a series of questions managers can be asked to help them develop effective strategies and practices to promote workplace learning. This tool assists organisations understand their management bench strength to support workplace learning.

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<tr>
<th>Manager Checklist for Workplace Learning</th>
<th>Never</th>
<th>Rarely</th>
<th>Sometimes</th>
<th>Always</th>
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<tbody>
<tr>
<td>1. Do you set out a clear vision and direction for your team members?</td>
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<td>2. Do you align personal development with business objectives?</td>
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<td>3. Do you communicate your expectations clearly?</td>
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<td>4. Do you communicate your expectations regularly?</td>
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<td>5. Do you ensure that everyone has a development plan in place?</td>
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<td>6. Do these development plans include both formal and informal opportunities?</td>
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<td>7. Do you ensure that individuals have the time &amp; resources required for development?</td>
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<td>8. How often do you discuss individuals’ development with them (+sub)?</td>
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<td>9. Do you work on developing confidence as well as skills?</td>
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<td>10. Do you ensure that individuals are motivated to achieve development objectives?</td>
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<td>11. Do you identify and celebrate success?</td>
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<td>12. Do you regularly invite feedback on your own approach to development?</td>
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<td>13. Do you demonstrate a concern for individuals’ reactions to feedback?</td>
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<td>14. Do you ensure that best practice and innovation are shared?</td>
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<td>15. Do you help individuals to build their network in support of their development?</td>
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<td>16. Do you discuss training goals and review training outcomes?</td>
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<td>17. How often do you review development needs?</td>
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<td>18. Do you demonstrate your own appetite for learning?</td>
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<td>19. Do you provide constructive feedback in a timely fashion?</td>
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<td>20. Do you ensure that individuals reflect on their performance?</td>
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<td>21. Do you conduct lessons learned reviews on project completions?</td>
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<td>22. Do you set clear and stretching objectives, then measure outcomes?</td>
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<td>23. Do you encourage people to gain new experience and skills to achieve their full potential?</td>
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<td>24. Do you take action when the basics standards of performance are not met?</td>
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<td>25. Do you evaluate the contribution of development measures to performance?</td>
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2. Strategies for Engaging Non-Learning Professionals in Workplace Learning

The effective engagement of non-learning professionals is critical for successful workplace learning. It is necessary for organisations that are looking to successfully support learning in the workplace to encourage the development of communities of practice, coaching cultures, networking and other approaches.

One of the group’s out puts was a list of 18 strategies that can help engage non-learning professionals. Some of these were in use in member organisations.
Others had been seen in use elsewhere. Still others were suggestions of strategies that the consensus of opinion agreed would be useful.

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<th>Strategies for engaging non-learning professionals in Workplace Learning</th>
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Ning Online Community Support

The Workplace Learning SIG established and used a NING online environment to store and share resources throughout the life of the group. The site, at [http://efmd-wpl.ning.com](http://efmd-wpl.ning.com), was used during the SIG lifetime as a repository for all presentation materials from the SIG workshops and CAS events and for storing shared materials provided by participants.