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...thinking beyond learning™

Five Key Principles™

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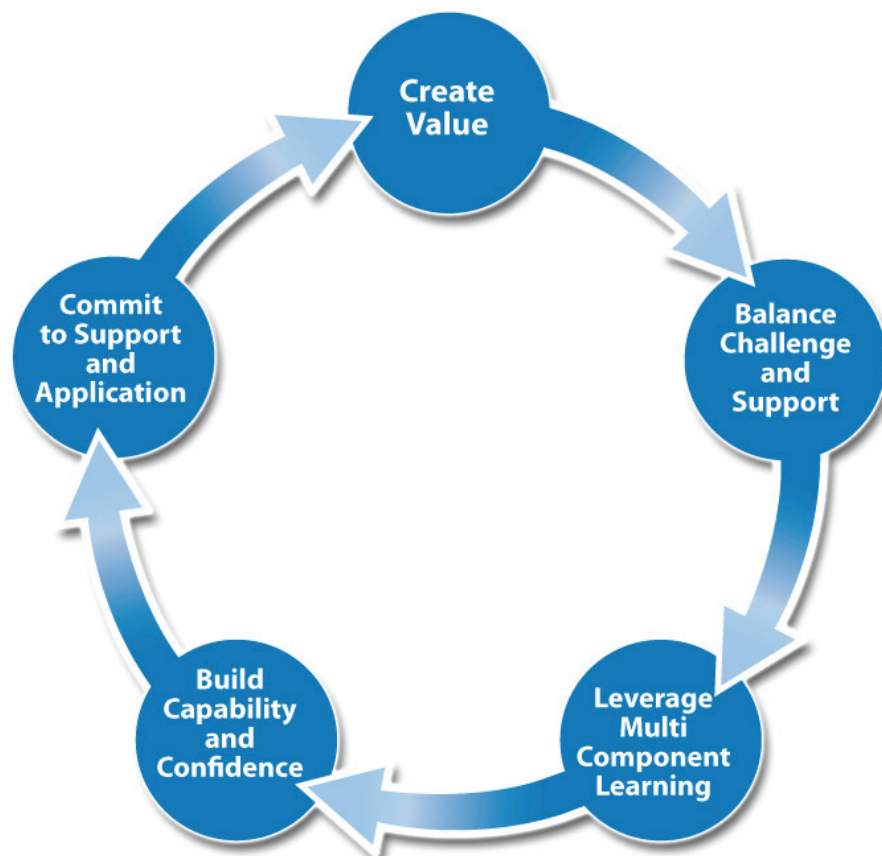


Five Key Principles™ which Guarantee Business Results

Hemsley Fraser's Five Key™ Principles are intended to work in a sequence, which take the client and the advisor through a logical and comprehensive thinking and decision making process. The principles all begin with action words – they are intended to be practical and lead to an informed discussion around options, benefits and mitigation of risk, leading to a measurable, cost effective and optimal solution. They are based on the reality of 'meeting the client where they are', respecting that clients are often working with imperfect data and have to make sufficing decisions. In other words, these principles are not intended as a purist, theoretical nirvana – they have been borne out of the reality of client work.

The model below shows the principles in the recommended sequence and what follows is a description of each principle. The individual principles have been evaluated against research, which has been distilled and summarised into key themes. A consulting toolkit has been developed to support practical decision making. This includes a bank of questions which support exploration of options, sharing thinking in an organised way and an efficient method of narrowing down options to reach an optimum solution, together with various tools, such as a Business Interpretation Tool and a Challenge/Support Continuum.

Five Key Principles™ Model



Experience to date is that some clients wish to see the principles being used overtly (i.e. they are keen to have an explanation of the principles and to see how they are being applied to guide decision making). Others have been made aware of the working method and its framework but have preferred that it is 'silent' in terms of what they and their team see. However, this does not affect the overall effectiveness of the principles.



1 – Create Value for the Organisation *and* the Individual

This is the foundation principle, from which the cycle starts and against which the results are evaluated at the end. There are two important issues here:

1. The bringing together of the organisation and the individual at the outset
2. The principle of creating value.

The 'and' in this principle is all important. Learning which is focused solely on organisational priorities, even with heavy corporate sponsorship, risks ignoring the individual's motivation to learn and the 'what's in it for me?' question. The result can be lip service, resistance and little of the collateral benefits of increased loyalty and commitment, which come from well positioned training and learning.

On the other hand, training which is focused on individual needs (even when these are collated in the form of a TNA from a critical group of people) is not necessarily anchored in any organisational priorities or metrics. This means that the measures of participant reaction are all important – but there is little basis for assessing the value of the training beyond that.

By bringing together the 'what's in it for me?' at the individual level and making a close link with 'how does this relate to organisational priorities, goals and metrics?', the starting point is the important principle of 'Create Value for the Organisation and the Individual'.



2 – Balance Challenge and Support

This is a crucial principle in providing the bridge between value and subsequent decisions about the precise nature of the learning solution. The idea that individuals need to have a balance of challenge and support for their learning to be effective is a long established principle of training design. Too much support, with a low level of challenge will lead to adverse participant feedback (e.g. the course was too level, did not bring anything new'). Too much challenge will produce defensive or aggressive behaviour, which hinders adoption of new skills or behaviours. It is all about getting the balance right, based on a sound understanding of the target audience.



However, at the organisational level, there is a similar level of insight which is required. A successful training or learning programme should seek on every occasion to create a level of challenge for the organisation to manage and implement. This challenge could form a new approach to learning methods (e.g. stretching their experience of using action learning, introducing a new technology) or learning from past situations where the training has been less successful. Even when an organisation has a good track record of using certain types of learning, the concept that there should be an additional challenge for successive training programmes is a helpful mindset to adopt.

The trick is to be deliberate and considered in the scale of the challenge and there are numerous interpretative judgements to be made (e.g. the speed with which the organisation typically makes decisions and implements their attitude to risk). A major step for one organisation could be a safe and unimaginative solution for another.

Hemsley Fraser has numerous client examples where the interpretative step of 'balance, challenge and support' has surfaced new opportunities and approaches – yet also avoided some pitfalls which would have undermined the success of a programme.

The key point is the value of being deliberate about this stage of thinking and decision making with clients and the consideration of challenge and support for both the participants and the organisation.



3 – Leverage Multi-Component Learning

The concept of blended learning is well established, although there is some debate about what it means to different people and certainly a debate about successful case studies. Rather than becoming embroiled in a philosophical debate about blended learning, Hemsley Fraser has adopted certain simple, practical principles:

- It is self evident that people learn in different ways (well supported by a vast body of research)
- Both the pace and pattern of work and the impact of technology means that, during the course of designing a learning solution, it makes sense to consider multiple methods of learning. The opportunities are there – so why not explore them?
- Borrowing from other sectors (e.g. technology, engineering, etc), there is no need to be overly concerned with the definition of a learning component. Technology and engineering live with the idea that a component is everything from a minute electronic component to a major part of an engine. The crucial point is that the components are **designed to work together** and have also been designed with a view to **working in different models** or versions of a product. In fact, the entire basis of mass customisation (another useful concept for the training business to borrow) is the idea that components can be configured in different ways to meet varying levels of customisation



Based on the understanding of value, the balance of challenge and support which is acceptable, it is possible to lay out the array of learning components and work through, with the client, the optimum combination. Various criteria can be applied (again, borrowing from other industries) to reach a joint decision on the optimum combination. Hemsley Fraser's experience is that this principle has identified the 'one more good idea' and that clients appreciate that already, as an advising partner, Hemsley Fraser is considering the cost effectiveness of building in re-use.

The important point of professional advice is that learning is always going to be more effective when it combines components (as opposed to using one component only). The only debate is about which components and in what combination. For organisations with a heavy focus on classroom learning (of which there are still a very large number) the concept of multi-component solutions opens up cost effective, flexible and manageable approaches to learning, which also increase the likelihood of that other long sought for benefit – sustainability of the learning.



4 – Build Capability and Confidence

If there are just two outcomes from a successful training programme, they must be enhanced capability (against the definition of value) and confidence. As with the other principles, these are two benefits which are understood at the individual level as a valuable outcome – however, they can also be described at the organisational level. Enhanced capability in a critical mass of people is about capacity; for example, capacity to deliver key business objectives (such as sales force/marketing capacity to develop a new market or leadership capacity to complete the successful integration of a newly acquired business). In fact, capacity is one of the most critical success factors in successful implementation of any business strategy and a training programme can be one of the most cost effective and fastest ways to lift capacity.

The second important component is that of confidence. Confidence links to motivation, inspiration to innovate and application of learning in the workplace.

In making detailed design and delivery decisions, Hemsley Fraser has found that focusing on just the two key factors of capability and confidence is a powerful frame for ensuring the right balance between the introduction of new knowledge or skills and the focus on how to create confidence through practice and application. Applying this thinking to both the individual and the organisation leads to the final principle in the cycle – which is all about how the organisation will use the training and learning.





5 – Commit to Support and Application

The final test of effective training is the extent to which it is applied in the workplace over a sustained period of time. There are elements which can be designed into a solution to assist application (action learning, reinforcement toolkits, stretch assignments, etc). However, the most important driver for application is opportunity. This means being deliberate about creating situations where people can use newly acquired skills, knowledge or behaviours – ideally as quickly as possible after completing the training. This could include asking them to take on a particular project or inviting them to play a role in a new initiative, which overtly links back to their training. The key point is focusing on the importance of opportunity and not leaving it to chance.

The other major influencer in application is the line manager – as both coach and role model. The line manager is most able to influence opportunity and also ensure that outcomes from training are integrated into performance management and reward.

The commitment to support also comes through integration with the broader HR agenda, including career and succession planning, talent management and step-up secondments.

Whilst the various approaches to support and application seem to be well understood, it is still surprising how many clients do not pay adequate up front consideration to this and do not view it as integral to the delivery of value.

Summary

- The Five Principles are an organising framework, supported by a toolkit, which enables client and advisors to work in partnership around an efficient, yet robust decision making process
- They provide guidance around crucial points of advice and judgement, based on both research and practical experience
- Importantly, the Five Principles enable training professionals to provide advice, with confidence, around the steps that are needed to create value, including the underpinning measurement and evaluation
- Confident, client focused advice, practical decision making and innovation, with a focus on creating value is the basis of a high quality engagement. This needs to become the benchmark for clients in demanding more of their training/learning partners. Hemsley Fraser's Five Principles provide a compelling and practical foundation for such engagements



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