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Making Global Programs Feel Local: 10 Guidelines

Creating Effective Global Learning
Solutions

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1. Introduction

Culture is a term applied to nations, to organizations, to age cohorts, and to professions. We talk about the culture of lawyers or doctors, the culture of Gen-X or Gen-Y, or the culture of Company A versus Company B. In all cases, culture is complex and hard to change, and, it is also one of the key considerations to take into account in designing any learning solution.

The goal of most multi-national companies is to be able to manage the dilemma of developing global approaches to strategy and to internal programs and making those programs feel local. This applies particularly to the development and delivery of learning programs.

Because designing learning experiences is as much about looking at individual differences, we pay particular attention to learning preferences. They typically guide design thinking. However, to make global programs feel local we need to think of learning style in relation to culture. The key is to think about what individual learners must experience and do that in the context of culture.

There are no easy formulas for global learning program design. There is no simple way to ensure success when there are complex cultural differences to deal with. However, the guidelines that follow are intended to suggest a way to create learning experiences that are sensitive to learning styles as well as cultural differences.

This paper is intended for senior stakeholders, HR/OD and Learning & Development practitioners interested in the creation of effective learning and development programs. Specifically, how the investment in the development of skills, knowledge and behaviours in their people around the world can be designed to fully support the organizations global strategic objectives and yet be a success in each local region too.

1.1. Culture and Learning Style

Culture

Culture has to do with the *values, beliefs, myths, traditions* and *norms* of any group of individuals. They are the unwritten rules of the social game. The more cohesive the group the stronger the similarity of those factors from person to person. Tribal cultures, for example, reflect very strong and homogeneous values, beliefs, myths, traditions, and norms. In our increasingly more diverse global environment, where there is a good deal of immigration across borders, national and regional cultures are tending to become more difficult to define. Nonetheless, there are some general trends that reflect differences in national cultures that must be considered in the design of learning solutions.

Organizations also have cultures and they get reflected in the same ways. For example, there are companies with very personal cultures. They celebrate employees' birthdays or marriages with the same enthusiasm they celebrate promotions or retirements. Other companies maintain a strong boundary between work and personal life.



There are consulting companies for which there are unspoken norms about only traveling to a client site outside of working hours. There are financial institutions for which “casual Friday” means sport jackets and white shirts instead of suits and ties.

One of the best sources of information about global culture, especially national cultures, can be found in Geert Hofstede’s work.¹ This was a long-term research project begun at IBM and validated numerous times since the original work. It identified five factors that differentiated across cultures. They provide an interesting litmus test when thinking about learning design because they speak directly to the way we interact with each other. Whether it’s face-to-face classroom training, virtual classrooms, or e-learning, each of these factors offers some guidance for design across cultures.

- Power Distance—Power distance measures the extent to which the less powerful members expect and accept that power is distributed unequally.
- Individualism—Individualism (versus its opposite, collectivism) is the degree to which individuals are integrated into groups.
- Masculinity—Masculinity (versus its opposite, femininity) refers to the distribution of emotional roles between the genders.
- Uncertainty Avoidance—This factor relates to the ability to deal with ambiguity and uncertainty.
- Long-Term Orientation—Perception of time is a major differentiator between nations. Long-term oriented societies foster pragmatic virtues oriented towards future rewards, like saving, persistence, and adapting to changing circumstances. Short-term oriented societies foster virtues related to the past and present such as national pride, respect for tradition, and fulfilling social obligations.

Hofstede’s work is especially important in the work we do at Hemsley Fraser because it is closely tied to people’s differing perceptions of leadership and the work of leaders. Different national or regional cultures have differing views of what it takes to be a good leader, who is qualified to be a good leader, and how good leaders are supposed to behave. We have developed a broad and widely acceptable point of view on leadership, especially in the western world. A quick reflection on the Hofstede factors should bring some of these differences quickly to mind. (see Dickson, Hartog, and Mitchelson² for detailed discussion).

So, while culture is an important consideration in designing for global delivery it also needs to be addressed with caution because it represents only a broad sense of the collective behaviour of people and does not reflect their personal styles and approaches. For that we need to consider learning styles.

¹ Hofstede, Geert and Gert Jan Hofstede, *Cultures and Organizations: Software of the Mind*. New York: 2005

² Dickson, Marcus W, Den Hartog, Deanne N., and Mitchelson, Jacqueline K., “Research on Leadership in a Cross-cultural Context: Making Progress, and Raising New Questions,” *The Leadership Quarterly*, 14 (2003) 729-768.



Learning Styles

If culture focuses on groups, learning style focuses on individuals. Learning styles help to describe our preferences for how we learn. On the surface there are preferences that involve preferred learning media (reading, listening, watching, etc.). Deeper at the root there are ways that we take in and apply information. We tend to rely on some variation of Kolb's Learning Style Inventory³ which has been around for quite a while and which has been studied quite extensively in terms of its relationship with culture measures. Given that very few studies found anything but some weak relationships it seems that our learning preferences are fairly culturally neutral.

1.2. How does this Impact the Global-local Dilemma?

What this all suggests is that the place to start designing a global program is with the standard focus (purpose, goals, content, audience level, etc.) followed quickly by a focus on individual learners and what we want them to experience. That starts with an understanding of how people learn regardless of their culture. In fact, most research suggests that learning styles are fairly resistant to cultural differences.

2. Designing for a Global Audience and Making it Local: The Guidelines

The following list of guidelines is not intended to be exhaustive, but is intended as a guide and has been captured from our working with multi-national clients over the last 20 years. In short, our goal is to build globally and deliver locally. We know that our clients want a consistent message delivered globally. They also understand that to make the message stick, to enable everyone to internalize it and apply it, their people need to work it through the filter of their local beliefs. With that in mind (Build Global/Deliver Local) here are some guidelines to consider.

2.1. Guideline #1: Begin with the End in Mind

We are working with a global pharmaceutical company on a number of learning initiatives. Each initiative is driven by a specific business goal and we are asked to create a single globally relevant solution to address that goal. Where do we start? We start with the business goal. For instance, we are being asked to create a single uniform approach to deal with a particular business issue, like cascading performance objectives from the top strategic direction of the firm to line managers throughout their entire organization. That is our charge. Regardless of approach or individual or cultural differences that focus must be front and center. Every activity, every discussion, every bit of supporting material must address that business issue.

³ Kolb, David A., *Experiential Learning*. New Jersey: Prentice Hall, 1984

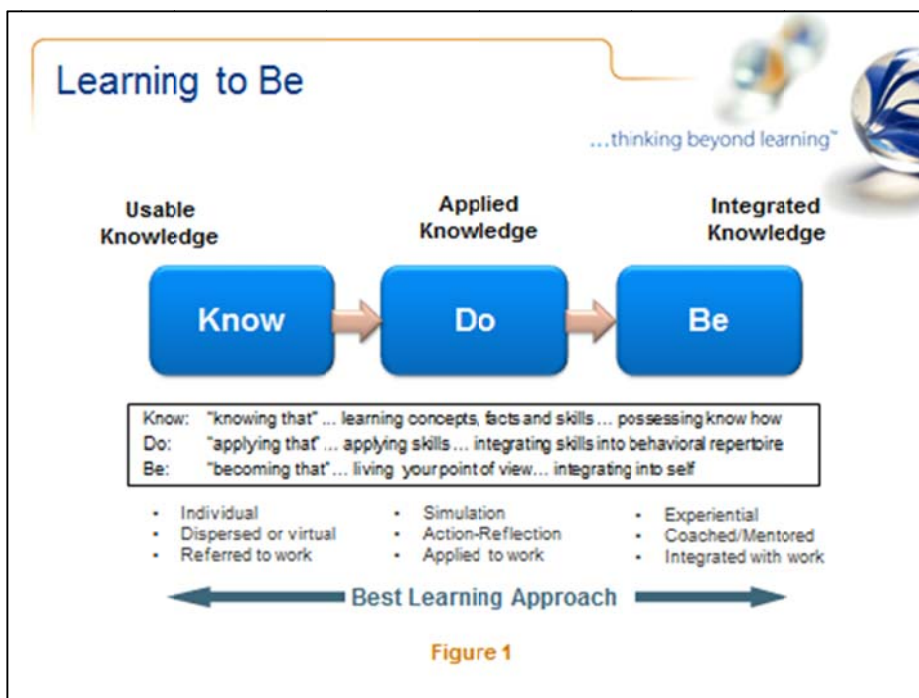


2.2. Guideline #2: Focus on Behaviours

In our design thinking we begin by analyzing the content in relation to the specific behavioural objectives we are trying to address. When we write these objectives well, we are already on the path balancing individual and cultural differences because the objectives themselves specify the kinds of things we want to happen. For instance, if it is important that the learners are able to “do” something new, not just “know” something new, the learning approach must involve actively engaging the learner and drawing on their integrator and doer learning styles. Often to get there you need to first engage the other two styles, but ultimately you need to move them from reflection to action.

Our ultimate objective is often to help people “become” something new. For example, we may want them to shift from individual contributor to manager. In cases like that we are asking them to develop new ways of thinking of themselves. A mind-shift like that will, by its nature, require them to confront components of their cultural identity so we will need to structure enabling activities that draw out and discuss their cultural view of what it means to “be a manager” and integrate global perspectives of what that means with their traditional view of things like power differences and masculinity.

In short, this guideline is about matching the intent of the behavioural objective with the approach to the learning and ensure that there are enabling objectives and activities to link global views with local tradition. This is about ensuring that the core, common and critical content and approaches are in place and operating well. The next step is to begin to attend to the individual differences so that all learners are engaged and successful.



2.3. Guideline #3: Focus First on Learning Styles then Culture

We have made an effort in the guidelines so far to link content to learning intent and approaches, but it is often important to go beyond that and specifically attend to individual differences. We need a deliberate approach to addressing preferences so that those with strong preferences, strong styles, have opportunities to learn to their strength. Do they learn better in a group? Do they need to practice before they try to internalize a concept? Have you created a learning solution that engages all kinds of learning styles and allows everyone at some point or other to play to his or her strengths?

The core solution aligns purpose, content, behavioural objectives and global learning approaches. Once the core solution is developed it is time to address group differences. It is time to address the informal social norms across cultural types be they national, age, functional, corporate or based on some other social differentiators.

It is time to think in terms of Hofstede's factors and in order to create variations of the solution that are true to the core solution, yet are sensitive to cultural differences.

2.4. Guideline #4: Use a Cross-cultural Assessment

One way to sensitize both designers and participants to cultural differences is through a self-assessment on cultural differences. A very useful assessment, based on Hofstede's work, is called **GlobeSmart**[®].

GlobeSmart[®] is a web tool providing global organizations with easy access to information on conducting business with people from more than 60 countries. GlobeSmart addresses the greatest cause of difficulties in global business interactions — the challenges of relating and communicating successfully with counterparts from other countries. The tool develops awareness on three levels: individual self-awareness, awareness of other cultures, and awareness of global business. (See: http://www.aperianglobal.com/web_tools_demos_globesmart.asp)

There are also mobile applications that deal with these differences which make them an 'always ready' reference.

2.5. Guideline #5: Validate Approaches, Activities and Exercises in terms of Cultural Preferences

This is a place where Hofstede's research really becomes important. Here the ideas of space and time, positional power, community versus individual, all the factors in his research come into play as we design a learning solution. The face validity of our programs from a cultural perspective has a great deal to do with initial acceptance of the learning experience. If people are asked to do things that they are culturally opposed to the learning battle can get lost before it begins.



One example of a situation where this can happen quickly is in the use of role plays. In certain Asian cultures people find it difficult to participate in typical role play exercises. They are uncomfortable “criticizing” other participants and in being “criticized”. They don’t like to expose their own vulnerabilities. Here we have explored the use of case studies and other approaches as substitutes with special attention to being faithful to the learning objectives. There are no simple solutions to some of these situations except in providing alternatives from the very beginning.

2.6. Guideline #6: Check for Obvious Cultural and Language Contradictions

Generate a list of words, phrases and concepts that are regionally appropriate but globally miss the mark. Slang always falls into this category. References to popular culture always fall into this category. Be especially sensitive with metaphors. If you use metaphors and examples be sure to invite participant interpretation and alternatives. Build in time to explore the meaning of local language in relation to the global language and program intent. This leads directly to Guideline 7.

2.7. Guideline #7: Leave Space to Talk and Interpret

In the pharmaceutical company example we gave previously, we deliver programs primarily in English so the materials, exercises, and approaches tend to be the same for programs we deliver in the UK, US and Sweden, all countries with obviously high English language skills. The interesting thing is that the same program delivered in the UK tends to take longer to deliver than the one in the US and the Swedish program takes longer than the UK program. Why? In the UK participants want to spend more time processing information and they are more patient practicing skills than their counterparts in the US. In Sweden participants want to spend even more time on the same material and approaches than their UK colleagues. We don’t have definitive data to prove this is the case, but it has been a consistent phenomenon across programs. Our assumption is that it has to do with a greater determination to master the material in the moment in the UK and Sweden, while the US participants believe they will go back on the job and master the skills there.

That is an example of a situation where language itself is not an issue. All participants speak very good English and the program is delivered in English. Space to talk is especially important here because participants need to explore the subtlety of the concepts, put them into their own frame of reference, and test their understanding of the true meaning of the models, concepts, and approaches presented in relation to their own cultural norms.



2.8. Guideline #8: Test Assumptions about Values, Beliefs, Myths, Traditions and Norms

Untested assumptions can kill the best communication. It is important to test assumptions about the way the models and concepts being presented relate to the values, beliefs, myths, traditions and norms typical of the participants' culture. When we propose a model of leadership is it consistent with the view of leadership held by the local culture? If there is a question it's very helpful to build in an activity that allows participants to explore their own assumptions and test the core assumptions of the program. For example, we might ask a group to respond on the one hand to the question "What are the characteristics of an excellent leader in your culture?" We might then compare that to their responses to the question "What are the characteristics, as you see them, of an excellent leader in the US?" As those differences emerge the conversation not only uncovers values and beliefs about leadership across cultures, but it also invites the discussion about the leadership model presented in the course and supported by the company. It brings the responsibility for interpreting the global concept into the control of the local audience.

2.9. Guideline #9: Acculturation May be the Goal

Having talked about being sensitive to cultural differences we are also trying to be mindful of the situation when the goal is really to establish a single corporate culture, independent of national culture. What is it the company is trying to achieve? We have a global customer who is very intent on having a mobile workforce. They want their people to be able to move around the world and do their job in a similar fashion wherever they are. As a result, we have created experiences that combine traditional face-to-face training with frequent virtual follow-up sessions. In the follow-up sessions we ask them how they are applying the global concepts to the local environment. We teach them reflective skills so that they can observe themselves and others as they interact in a new culture. And we encourage them to understand, accept, and celebrate local cultures and global differences. We try to do little things consistently like ask them to bring local flags to global programs. We move face-to-face sessions around the world and have little contests to see what people know of the local culture. We use **GlobeSmart**[®] so that we can continuously reflect on the impact of local culture in interpreting global goals.

2.10. Guideline #10: A Willingness to Let Go

When all is said and done, the ability of designers and facilitators to let go of their favourite learning approaches in the face of cultural challenges will be the key marker of success. Our team have become comfortable and flexible in acknowledging the need for a mix of approaches to be successful. We are always looking for the impact of culture on learning style, knowing that we need to be simultaneously sensitive to both individual differences and cultural differences.



3. Conclusion

Creating a successful global learning solution that works locally too requires:

- A focus first on the core global program design in terms of purpose, objectives, content and learning approaches
- Continuous application of good learning principles including attention to learning styles
- An overlay of cultural awareness that drives:
 - Cultural sensitivity in terms of exercises, activities and approaches
 - Flexibility in terms of the use of time to test ideas, assumptions, values and beliefs
 - Adaptability in terms of using local examples, metaphors, and stories to support global perspectives
 - Personal recognition of cultural beliefs and biases
 - Participant recognition of the same
- Time to discuss, explore and challenge assumptions about the meaning of terms, models, and processes
- A willingness to let go of favored learning approaches in preference to local preferences.



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