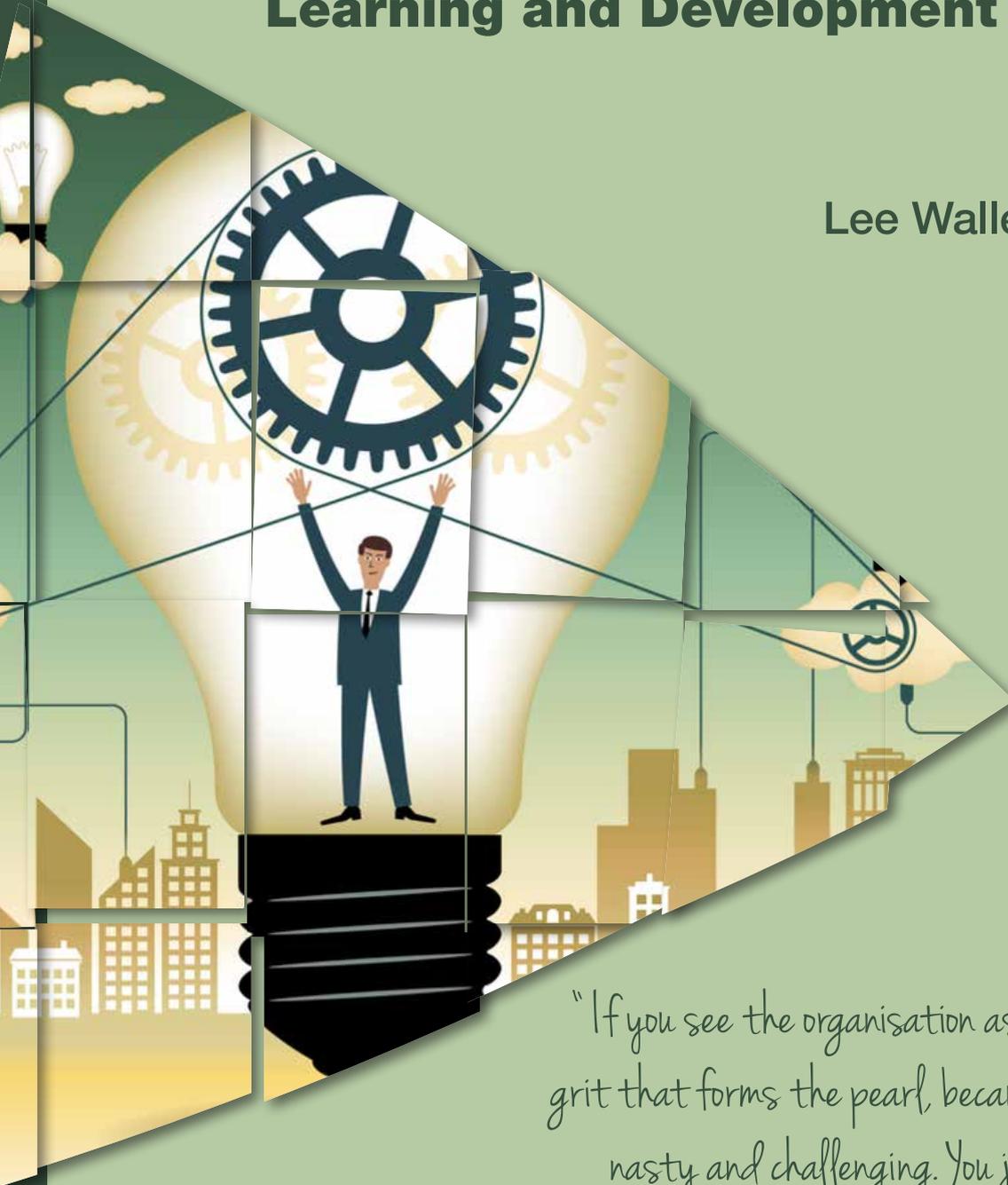


# From Grit to Pearl: Enhancing the role and influence of the Learning and Development professional

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Lee Waller and Inge Wels



*"If you see the organisation as the pearl, you're the grit that forms the pearl, because the grit is always nasty and challenging. You just have to make sure that you don't get rejected."*



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# EXECUTIVE SUMMARY

## Introduction

Throughout the past decades the role and function of Human Resources (HR) and Learning and Development (L&D) have changed significantly, from what was once a largely administrative Personnel Department to a function that is now required to fulfil a much more professional, strategic role. Whilst HR have attempted, with differing levels of success, to become more strategic in their focus, L&D professionals have often struggled to achieve this shift, and face a variety of challenges to establishing themselves as strategic partners and exerting real influence within their organisations.

These challenges are wide ranging, and include issues in engaging in critical, strategic conversations, the ability to align their initiatives with organisational strategy, a lack of perceived credibility in the eyes of senior managers, and difficulty in demonstrating or influencing the impact of their activities.

This paper discusses these challenges in detail, and through conversations with members of three organisations representing best practice in effective and influential L&D, explores how the profession can tackle and overcome these challenges to position themselves as strategic partners, and increase their influence within their organisations.

## Methodology

One-to-one, semi-structured interviews were conducted with 15 individuals in total, from three different organisations: Siemens, B&Q and AXA Australia, exploring their perspectives of the role and influence of the L&D function within their organisation. Interviewees included the three Heads of L&D, four HR Managers, and eight senior operational managers.

A thematic analysis explored the participants' reported experience within each organisation,

and was structured around four themes: approach to L&D; the nature of L&D programmes; organisational attitude towards L&D; and the L&D function.

## Findings

### *Patterns across the case studies*

Whilst the findings are presented as three individual case studies, a number of themes emerged across all the participant organisations. In general, their learning and development strategies were agile and adaptive, aligned to the organisational strategy, developed in collaboration with departments and critical stakeholders, and with a focus on outcomes and ensuring that learning was transferred. Interventions were offered across all levels of the organisations, and impact was felt at individual and cultural levels.

Support and commitment from senior managers and line managers was reported by all three organisations to be critical to the impact of L&D interventions, as was the development of a culture of learning that establishes learning as a continual process.

The L&D professionals were typically described as pragmatic, passionate and committed, and fulfilled a variety of roles from expert and specialist, to mentor and change agent. The Heads of L&D exerted their influence through the development of relationships with critical stakeholders across the organisation, allowing them to get close to the business. A commercial understanding facilitated their engagement in strategic discussions and helped establish their credibility.

### *Implications for the L&D professional*

Our research suggests that in order for L&D professionals to establish themselves as strategic partners, to develop the trust

and credibility required to influence and to challenge, they need to develop themselves to become experts in three domains:

1. The 'grit', the trusted advisor, who 'irritates' and challenges the organisation
2. The learning expert, the specialist who understands how individuals learn and change their behaviour
3. The organisation development expert, able to translate individual change to change at a systemic, organisational level.

To become the *trusted advisor*, L&D need to be able to develop relationships with critical stakeholders. This will get them close to the business, get them involved in strategic conversations, help them to understand what the business needs, and ensure that their L&D activities support the business and respond to this need. To do this they need to develop their self-awareness, their personal impact, and consulting skills, as well as develop a commercial understanding. This will enable them to cultivate the credibility and trust

to really have sway and influence in their organisations.

This credibility in turn is facilitated by L&D becoming true experts in *adult learning*, understanding how to engage and motivate learners, how to ensure learning transfers and has impact, and that this impact is clear and visible. Designing interventions in collaboration with senior managers, line managers and different units and departments will ensure learning is relevant, will be supported, and will have impact at an individual and organisational level.

The final role L&D need to fulfil is that of *OD expert*, supporting individual and systemic change and ensuring that individual development has impact at an organisational level. Developing a shared language and understanding of leadership and developing a level of consciousness around learning and development will help to ensure that learning and development results in both individual and organisational outcomes.



# INTRODUCTION

Over the past 70 years the role and function of Human Resources (HR) and Learning and Development (L&D) have changed considerably. What was once 'Personnel' with a focus on administrative duties such as discipline, safety and recruitment, has evolved into a more encompassing, more professional function attending to issues such as diversity, downsizing, and talent management, and taking responsibility for building an organisation's capability to learn, perform and deliver its strategy (Dunn, 2006).

Cohen (2011) suggests that in spite of these changes, the fundamental challenges faced by HR and L&D professionals today are much the same as those of the 1950s; how to manage and motivate employees, and how to develop competent leaders. The difference, according to Cohen, between then and now, is the context within which HR and L&D professionals must operate. Globalisation, changing demographics, and volatile economic environments have necessitated a move towards a more business-focused, strategic approach to HR and L&D (Cohen, 2011).

In recent years the HR function has tried to redefine itself as a strategic partner, with varying levels of success (Anderson, 2009), and there are indications that the L&D function is attempting to follow suit (Patterson, 2010). The literature however, suggests that few L&D professionals have managed to achieve this move, and this would appear in part to be due to their limited status, influence, and impact within their organisations. This paper explores why this is the case: what are the challenges facing L&D professionals, and how might they overcome them to help establish their role as a strategic partner and improve their influence within their organisations?

## The strategic importance of L&D

For some time organisations have understood that HR activities, including training, recruitment, appraisal and reward can facilitate or hinder the performance of employees, and as such, have an impact on the organisation's ability to achieve its strategic objectives (Cryer & Schneider, 1996). It is argued that the unique combination of skills within an organisation can provide superior value to customers and be a source of competitive advantage (Ulrich, 1997). Learning in particular is considered critical to organisational performance as environments change, technologies develop, competitors come and go. Remaining competitive, adaptable, and finding solutions to new problems therefore, all rely heavily on the organisation's capacity to learn (Garvin, 1993).

In a 2009 poll, IDC found that 80% of respondents thought learning and development played a moderate to significant role in helping organisations achieve their strategic objectives (Anderson, 2011). A similar study in 2011 of Chief Learning Officers found that learning and development was perceived as having a critical role to play in recovering from the recession, particularly when the strategy involved repositioning for future growth, or growing aggressively (Anderson, 2011). As organisations continue to recognise human capital as their most important competitive asset, the role that L&D take is now necessarily more strategic if their activities are to produce the outcomes that address the organisation's human capital priorities (Ulrich & Brockland, 2009). Their ability to take on this role as a strategic partner however, would appear to be hindered by a variety of factors.

## Current challenges to the role and influence of L&D

### *Maturity and skills*

One factor that appears to be impacting the ability of L&D professionals to establish themselves as strategic partners is the relative newness and standing of the profession. Compared to other professions, such as accounting and engineering, L&D are not considered well established and systematised, and as such have not yet gained the same degree of status or influence as other, more well-established functions (Kahnweiler, 2009).

Also implicated in the influence and impact of L&D is skills development. Research suggests that many L&D leaders lack the necessary skills and competences to understand business needs, contribute to debates around organisational strategy, and influence key stakeholders (Smith, 2010; Macaulay & Cook, 2010; CIPD, 2007).

### *A requirement to demonstrate ROI*

Not surprisingly, the current economic climate is putting considerable pressure on L&D budgets. Organisations are cutting or modifying leadership development programmes, and fewer leaders are offered the opportunity to participate in development activities (Bersin & Associates, 2009). In a study of 217 top companies – those demonstrating strong leadership practices – Gandossy *et al* (2009) found that organisations were making smaller and more targeted investments in leadership capability improvement, and focusing on high-impact initiatives, rather than nice-to-haves.

To secure this limited investment, L&D professionals are now required, more than ever before, to demonstrate the impact of their activities on the bottom line. But it would seem few are able to do this. In a survey of Fortune 500 CEOs, the ROI Institute (2009) found that whilst 96% of CEOs wanted to receive data on the business impact of learning, only 8% did. This is likely due to the fact that it is notoriously

difficult to demonstrate a link between L&D interventions and business results, and many organisations have failed to establish an efficient and effective way to do so (Burgoyne *et al*, 2004; James & Burgoyne, 2001; Hayward, 2009).

Irrespective of the metrics however, perhaps what is equally critical is that L&D professionals have limited influence over whether their activities do in fact impact business results, as this depends so heavily on the learning culture of the organisation which supports the application of learning, as well as their capacity to align their activities with the organisational strategy, which will determine whether or not interventions result in outcomes considered critical to the organisation. The literature suggests that the L&D function has two key stakeholders in this regard: senior management who decide corporate strategy (Gryger *et al*, 2010) and line managers who often hold training budgets and make decisions regarding staff participation in learning activities (Hutchinson & Purcell, 2007). L&D's ability to engage and influence these two stakeholder groups is, as such, critical to their ability to implement activities which impact business results, and in so doing, increase their status and influence within the organisation, which will affect the impact of interventions and therefore the credibility of the L&D function.

### *Influence of the learning culture*

It has long been established that the culture of an organisation is critical to the transfer of learning from leadership development initiatives (Waller, 2011). The support individuals get from their line managers to attend development programmes and to create opportunities to use learning on their return, the openness of the organisation to doing things differently, their tolerance of mistakes, and the organisation's attitude towards learning and development, will all hinder or facilitate an individual's ability to apply learning, and ultimately influence the overall impact of the learning and development intervention.

The development of this learning culture depends in large part on the senior managers and line managers within the organisation. Line managers often control development budgets, nominate individuals for training, undertake less formal, on the job development activities, such as induction, coaching, and mentoring, and have a great influence, through the support they offer, on the success or failure of their subordinates' efforts to transfer their learning, which ultimately determines whether or not an initiative has impact on business outcomes (Hutchinson & Purcell, 2007).

Senior management engagement with L&D activities is also vital in this regard. Line managers have competing priorities, and under pressure may channel resources elsewhere, and focus on short term goals rather than longer term staff development (Hutchinson & Purcell, 2007). Senior managers have a critical role to play in demonstrating the importance of learning and development, encouraging line managers to place L&D towards the top of their priority list. As such, senior managers can have a powerful influence on the development of a learning culture, and therefore on the impact of L&D activities on the bottom line. Research suggests however, that whilst top management support for L&D and HRD may be espoused, it is often absent and not supported with true commitment and action (Gubbins *et al.*, 2006).

#### *Alignment with organisational strategy*

Aligning L&D activities with organisational strategy is also critical to L&D's ability to impact the issues that are of strategic importance to the business. Rather than aligning with the needs of the organisation however, some researchers have found that leadership development tends to be more aligned with perceived wisdom about best practice (Ready & Conger, 2003; Davidson & Martineau, 2007), a perspective that finds support from many studies which suggest that leadership development lacks strategic alignment with business needs (Anderson, 2009). Indeed leadership development activities are often

perceived as somewhat ad hoc and haphazard, and disconnected from organisational life (Barton & Delbridge, 2004; Day, 2011). It is equally critical that L&D initiatives are also aligned with the distinctive business context of the organisation, and the particular capabilities essential for success in their specific industry (Gurdjian, Halbeisen, & Lane, 2014)

CIPD (2007) and others suggest a number of factors may be hindering the efforts of L&D professionals to achieve alignment between their activities and organisational strategy. Firstly, organisational strategy is constantly changing in its efforts to keep up with a rapidly shifting environment. In order to remain strategic, the onus then is on L&D professionals to constantly reassess their activities, and adapt at a similar rate. But changing L&D activities and bringing about different learning outcomes often takes time. There is also the challenge of balancing longer-term strategic L&D needs with shorter-term imperatives, which has been reported as a real test for L&D professionals (CIPD, 2007). Finally, as responsibility for delivering and funding learning and development is devolved to line managers, L&D professionals are not always able to ensure that learning is aligned with business priorities (Anderson, 2009; CIPD, 2007).

Another factor crucial to aligning L&D with organisational strategy is the engagement of senior management, as found in an online survey by McKinsey (Gryger, Saar & Schaar, 2010). They found that in companies where capability development was focused on the skill priority most critical to the company, 38% had senior leaders involved, compared to 28% where HR determined the agenda. They also found that programmes were considered more effective in driving business performance, and a larger percentage of the operating budget was allocated to development, when senior leaders were involved in the L&D agenda. Senior management involvement in L&D would appear therefore, to be critical to their ability to align activities to strategy in order to impact business results.

### *Credibility*

Getting senior managers involved in leadership development however, is a constant challenge to L&D professionals attempting to launch development programmes (Bailey & Clarke, 2008). A significant issue is ensuring that L&D are positively perceived by senior management, both to get their support for their activities, ensure their activities are aligned with the needs of the organisation, and also to encourage senior managers to promote a culture of learning. The literature however, suggests that this group's perceptions of L&D are not often positive. Some 16 years ago, Meldrum & Atkinson (1998) found that line managers were largely ambivalent or negative about the influence of HR professionals, particularly in terms of their strategic overview of the business, a perception which appears to have changed little in recent years, as a 2012 study also found that only 18% of executives considered L&D activities to be aligned to the needs of the business (Taylor, 2012).

Hamlin (2010) argues that the lack of credibility that L&D professionals have creates a vicious cycle – without credibility L&D professionals will not be consulted about strategy and business needs, and without consultation, leadership development programmes will not be aligned with strategy, which in turn will mean they do not result in the required impact on the business, further damaging the credibility of the profession.

If L&D are to establish their role as a strategic partner and improve their influence within the organisation it would appear imperative that they develop the required skills to engage and influence key stakeholders to ensure they are involved in strategy development, and are able to align their activities to the needs of the business. This will enhance their impact on critical business outcomes, further enhancing their credibility and influence.

### **Objective of the research**

The objective of the research is to understand how the profession can tackle these challenges by exploring how three exemplars of effective and influential Learning and Development functions overcame these challenges in practice. How did they develop the necessary credibility and acquire the appropriate skills to engage those critical stakeholders, without whom their activities would not be aligned to the strategy, would not be supported by the learning culture, and would ultimately fail to impact on the business?

# METHODOLOGY

## Procedure

Qualitative data were collected through 1:1 interviews with managers from three large organisations: Siemens, B&Q and AXA Australia. Interviews were conducted both face-to-face and over the telephone. The interviews were semi-structured, exploring participants' perspectives of the role and influence of the L&D function within their organisation.

## Participants

15 interviews were conducted in total, with three managers from Siemens, five managers from B&Q and seven managers from AXA Australia. Interviewees included the three Heads of L&D, four HR Managers, and eight senior operational managers.

Participant organisations were selected based on criteria such as the transformation of their L&D approach, staff engagement scores, or recognition through accreditations, company listings, or learning and development awards.

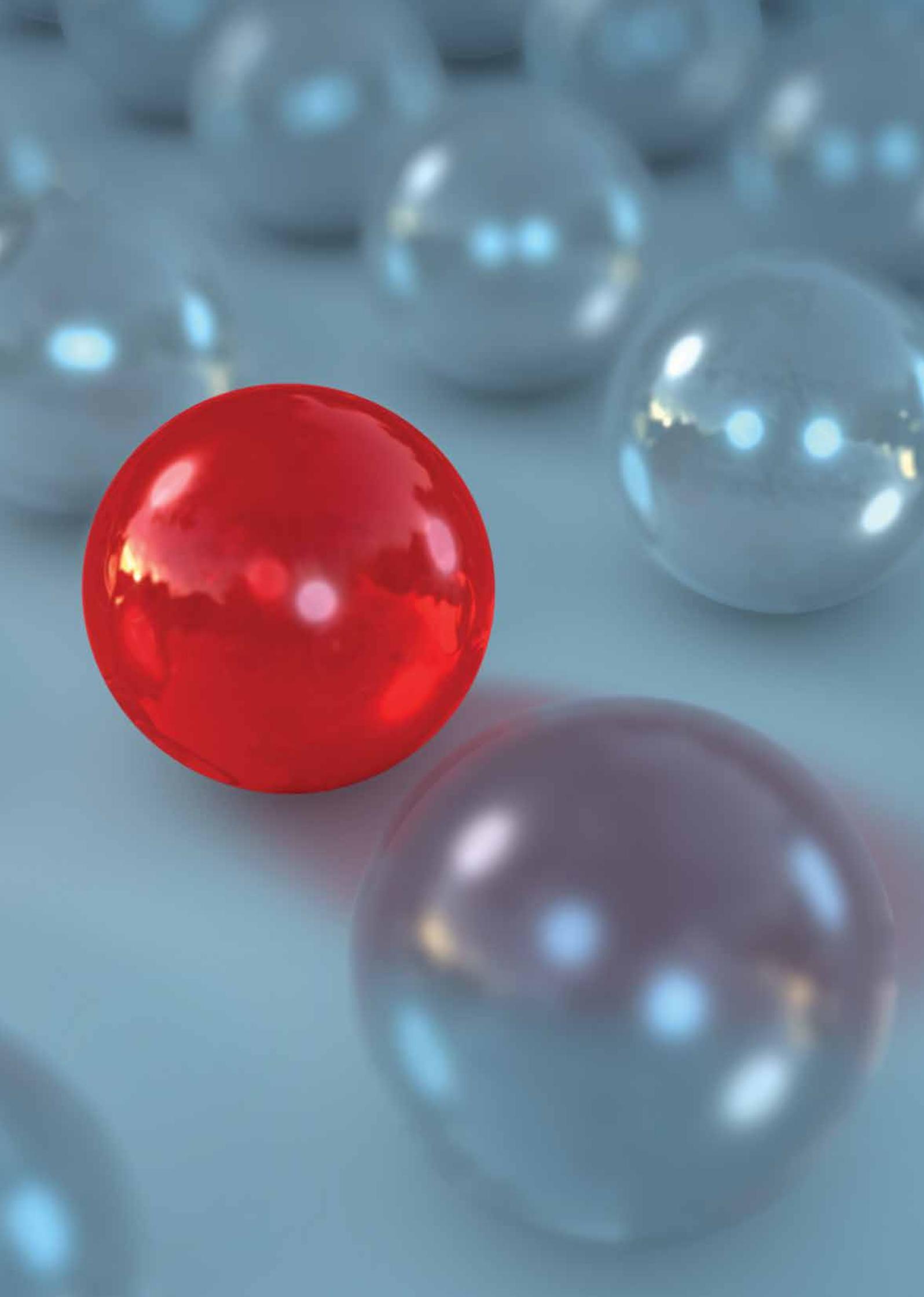
## Analysis

A systematic thematic analysis of interview transcripts was conducted for each organisation, to allow the exploration of the participants' experience and to generate meaningful, rich data. The analysis was structured around the following topics, and presented as three individual organisation case studies:

- Approach to L&D
- The nature of L&D programmes
- Organisational attitude towards L&D
- The L&D function.

Text relevant to these topics, which became the core categories, was coded, and these codes later arranged into themes and subthemes. For example, the emerging theme of 'iterative' became a sub-theme of 'the development process for L&D activities', which in turn came under the category of 'the nature of L&D programmes'.





# FINDINGS

The following section explores the findings from the research, gathered between 2011 and 2013, detailing how the three organisations approached L&D, the nature of the interventions they delivered, the organisations' attitudes towards learning and development, and the role, perception, capabilities and influence of the L&D function. The findings are presented as individual case studies in order to present a contextualised narrative for each organisation. Each case study is followed by a brief addendum detailing any significant changes since the data were collected.



## CASE STUDY: SIEMENS

Siemens is a German, multinational engineering and electronics conglomerate headquartered in Berlin and Munich. Siemens' principal activities are organised into four main divisions: Industry, Energy, Healthcare, and Infrastructure and Cities. Siemens and its subsidiaries employ around 360,000 people across nearly 190 countries. Siemens was selected as an exemplar of best practice because of the transformation of their approach to L&D to a centralised global governance for HR, Talent Acquisition, Learning and Leadership in one corporate HQ organisation which reports directly to the Siemens Managing Board Member responsible for HR.

In addition the company are listed as one of the top employers in Germany and have been granted the Corporate Learning Improvement Process (CLIP) accreditation by the European Foundation of Management Development.

### The HR function

Whilst the Head of L&D at Siemens is not a Board member, the Head of HR does sit on the Board, and is responsible for the HR strategy, learning and development activities, and leadership. Below the Head of HR sit functional HR organisations which interface with the operational units and incorporate the varying HR functions including talent management, leadership development and organisation development, with practitioners operating as a network of peers.

### Approach to L&D

#### *Development of the L&D strategy*

The L&D strategy at Siemens is an **adaptive** one. Activities are designed to respond to the constantly changing environment, reflecting the challenges that their leaders are facing in the moment. There is a recognition that what was

once topical and leading-edge, will quickly be perceived as out-dated and redundant, and as such, the strategy and activities are continually revised, adapted and updated to remain relevant and cutting-edge. *"I don't think [dealing with a complex environment] is the main theme any more. It's now much more about ambiguity than about complexity, and so we're now re-inventing this whole course in order to reflect that more."*

The perspective the function takes is long-term, incorporating an understanding that behaviour doesn't change overnight and their credibility as a department needs to be earned. A step-by-step process is therefore required to embed new behaviours across such a large organisation. Such a process also demonstrates the impact of their activities and wins the hearts and minds of key stakeholders. There is also an understanding that change is a delicate process. What happens in one area will impact another, and as such **change needs to be incremental**. Moving too fast causes anxieties and defensiveness. In order to engage and bring others with you, one needs to change step by step. The size of the organisation can limit one's ability to influence, but by focusing on the immediate environment one can instigate a step change across the organisation. *"I can only influence my environment here and then see what the repercussions are."*

Critical to the success of the L&D strategy is an **alignment with the strategy of the business**. This they achieve through networking, through making connections, by staying close to all functions of the organisation, and ensuring that the L&D strategy and activities reflect the reality the business is facing. *"We always have to find the sweet spot, connecting all this to business reality. All that we are doing has to stand the reality test of next Monday morning."*

### *The development process for L&D activities and initiatives*

The approach to the design of activities is **collaborative**. Different stakeholders are engaged in the process, including senior managers, leaders from all levels, and previous and future participants, to capture their perspectives on the area of development and ensure that it resonates and is congruent with the needs of the organisation. *“We are having interviews with our Alumni, with leaders, with the external stakeholders to really understand the different perspectives that you can have on such a question. And in the end, arriving at choices, and decisions that are really turning this initiative into something that creates value.”*

The development process is **thorough** and **iterative**, drawing on best practice from other programmes and business schools, responding to feedback from across the organisation and from programme Alumni about what works and what does not, what has been applied and what hasn't, and building on strengths and known successes from previous programmes.

Development programmes are **tailored** to the needs of specific businesses or target groups, focusing on the required outcomes in terms of capability gaps, levels of knowledge, business and operational requirements. Programmes incorporate topics and learning that is appropriate and relevant, connects with the business and touches the nerve of the receiving group. Initiatives have a commercial focus and are designed to generate business results. *“You really have to understand what this target group is all about, what the real challenges are, and how you can then use the ideas, concepts, elements you have to work with, to create insight.”*

At the same time there is a **red thread** woven through the different programmes aimed at different target groups, to ensure that both **language and behaviours are embedded** across the business. The development of a coherent leadership framework allows learning to be applicable to even a diverse, heterogeneous organisation. *“We actually were developing, despite our diversity, quite a harmonised leadership culture and quite a harmonised framework of how we manage people.”*

Given the number of potential initiatives and the limited resources available, the challenge for L&D at Siemens is to prioritise those which will have the biggest impact, and in so doing, ensure that the function is recognised as adding real value to the organisation.

## **The nature of L&D programmes**

### *The range, content and format of L&D programmes*

The L&D function provides a **range of activities** targeted at all levels of employee from junior leaders to the Board, helping to disseminate the ideas of the function and the leadership framework throughout the organisation.

Programmes are designed to **challenge**, to take participants out of their comfort zone, and to present the possibility of failure, but in an environment that feels safe, where trust is established, and participants feel able to disclose, to contribute, and stretch their capabilities. *“And what we want to have, what's necessary for learning, is that we feel really safe.”*

Initiatives cover a range of content areas. At a senior level they are designed to help managers develop the self-awareness and maturity to deal with the ambiguity and complexity of a rapidly changing environment. Rather than just developing skills and competences, programmes are designed to change the culture of the organisation and have **impact at a systemic level**. *“The process has led to a result that resonates with the people and that'll change...the reality for Siemens as a whole.”*

*“It's this journey of self-awareness and maturity that I have to make. To take decisions I have to pay a price. It's not a right or wrong solution. It's just I go left or I go right, and somehow I cannot have both. And then I have to deal with the consequences.”*

Through coaching, through experiential learning, through feedback and reflection, programmes take a personalised approach, **bringing the individual into the room**, engaging them actively in the learning and translating the content into something very personal to them.

### *Impact of L&D initiatives and programmes*

Our interviewees described impact from L&D activities both in terms of individual, cultural and attitude change. At a **cultural level**, activities were helping to open up discussions, address challenging topics, and generating positive energy. Individually, programmes have been described as transformational, helping individuals develop a **self-awareness** that not only improves their **leadership capabilities**, but can also translate into other areas of their lives.

*“I’ve found it in the courses, especially when they are these – big word – “life changing” moments. When you work with people some will have an epiphany and then just realise something for themselves, where you see that you can make a contribution to somebody’s life. And that has happened really quite a couple of times I would say over the last years, and these are great moments.”*

Individuals have discovered new ways to lead, to work with their teams, and as a result the impact is felt at that level. **Teams feel empowered and engaged** in decision-making, and as such are more motivated to act on those decisions.

*“So instead of being directive and saying, let’s do it this way, I ask the question: so what would you recommend? And in 80% the answer given is exactly what you would have said. Just that the fact that your team is saying it, they feel more empowered, the buy-in is there... The answer that comes is either the right one, because you thought it was the right one, or it is something else. And then you have to open up and engage with it. And then, in more cases, it’s even better than what you thought.”*

### **Organisational attitude towards L&D**

#### *Senior management commitment*

Siemens’ approach to L&D ensures that initiatives have the **support of senior management**, and that the capabilities and behaviours being developed are congruent with the leadership culture in which the participants must operate. Similarly, senior leaders are invited to speak on leadership courses, further demonstrating organisational commitment to the initiative.

*“The key is to approach the very top of the organisation and understand at the CEO level, what it is that they want the organisation to develop. What is the leadership style and what is the leadership focus that you want to have in the organisation? Because all these things have to come from the top. There is no point in training your leadership team or your middle managers on an open culture of feedback, and have your teams develop their decisions themselves, when you want to manage your team in a totally different way, and say it’s me who will take the decision that everybody executes. You totally lose credibility and then the whole thing dies. So I think the first thing is starting at the top.”*

#### *Culture of learning*

Part of the philosophy of L&D at Siemens is to develop a culture of personal responsibility for learning, a **level of consciousness around learning** that encourages individuals to **take responsibility** for and direct their own development.

*“We felt that the organisation was now ready to make a change from being offered something in a teaching mode, towards approaching learning from a learning perspective: offering participants some elements and encouraging them to reflect and think about whether it is something that’s useful for them or not. To take ownership for their own learning.”*

**Feedback** which fosters self-awareness and insight is encouraged, mistakes are regarded as opportunities for learning, and there is an acknowledgment, advocated by the L&D function, that in order to embed new behaviours **change needs to happen at a systemic, cultural level**. This was reported as a challenge for the function – how to help the organisation to recognise and deal with the required cultural shift. *“But then the pattern is very difficult to change, even if you’ve changed a person, it does not mean that the organisation as such is changing.”*

## The L&D function

### *Role and perception of the L&D function*

Our interviewees described the L&D function as a **proactive** one. Rather than responding to requests, they actively seek out opportunities to add value, identifying skills gaps and development needs. The L&D function innovates, challenges, “irritates” the organisation, posing questions and initiating new thinking.

*“Who, if not the learning organisation, is irritating an organisation and bringing in new thinking and new questions... shouldn’t also a learning department be a source of innovation for new thinking? You can wait until somebody tells you or you can start to think this through and then act strategically on them. That’s what we try to have as a mind-set.”*

L&D initiatives are not just about developing leaders, but through organisational-wide development L&D becomes an **instrument for organisational change**, and L&D professionals become agents of change, stimulating innovation, and challenging the status quo. *“We have always used the learning organisation as a lever for organisational development for Siemens.”*

The Head of L&D shared an example of an initiative designed to accelerate the development and progression of women leaders: *“There was an issue that was in the air and we both decided that we wanted to do something around that, because we see an opportunity for us to really show the value of what we can contribute. It’s a symbolic issue, it is really important, high on the corporate agenda at this time, but it’s also risky because it can be taken the wrong way very quickly. So that’s the first strategic choice – do you get involved in such a topic? Some topics you get from the CEO, you just have to do something. But our understanding here, when you think as an organisation, is that you have to be pro-active in everything you do.... The question is, now we have responsibility for diversity, what can we do, as a leadership development unit of Siemens, to help capable women grow more quickly and be able to step up to more senior roles earlier? And this is a*

*good example of how we have to work: nobody has asked us to do something, but we see that we can create value there.”*

As a function that operates across the whole of the organisation, L&D are also able to take a **strategic, helicopter view**, harmonising the perspectives and requirements of a disparate set of customers and partners, and aligning them all with a common vision for leadership at Siemens. *“Everybody is looking at it from their perspective...but somehow somebody has to have this overall perspective and make sure that this high level vision makes sense, is maintained or preserved. That’s been typically the kind of role that we have.”*

The organisation as a whole maintains a positive perception of the function. The senior management are reported to be engaged with their activities and consider them to be **aligned with the requirements of the organisation**. The function is **valued** and has *“established enormous **credibility** as a learning organisation.”*

### *The capabilities and influence of the L&D professional*

Reported to us as one of the most critical means of influencing the organisation for the L&D professional was through developing **relationships**. Through relationships one gets the opportunity to understand others’ needs, perspectives and agendas, and the opportunity to glean, respond, and act on their feedback, all of which helps to engage them with what you are trying to do. *“Persuasion does not work, you have to convince people. And you can only convince people when you address their personal needs and their personal agenda, and you need to involve everybody.”*

Similarly, through actively seeking out and establishing relationships with key stakeholders such as senior managers and participants, one can develop networks of advocates and protagonists **outside of any formal business connection and outside of one’s formal authority**, who are bought in to their ideas and engaged with the need for change. *“But it’s not so much active influencing as it is*

*pro-active network management, relationship management, I would say. So that whenever there is an issue you have the right partners and you can address it."*

Having both a **commercial and OD background** also helps in making connections between the business needs and the individual and organisational development needs, and finding the right balance between the three.

Considered important to effectiveness is an ability to **reflect on past experience**, and to turn past difficulties into critical development incidents, opportunities to learn and to improve. *"And it has shaped me, because it's not just an example of something that was a tough situation, but it shaped me in many ways because it was a hard time. And it has triggered a lot of thought also later, on how to deal with these kind of situations, to learn from them."*

As an L&D professional, having a **curious and enquiring mind-set**, recognising that you cannot know everything, and being driven to understand and make sense of what you see was considered critical to their influence. The L&D professional needs to **walk the talk**, to be a continual learner, go through the process that their participant groups are going through, and live their realities, in order to be seen as credible. *"You have to be a learner yourself, and you have to have a positive attitude towards understanding what is happening if you want to take others along in leadership development."*

*"When you deal with dilemma, when you talk about issues like trust, about listening, about dealing with emotions, whatever it is, you need to be seen as credible by your environment, both your own team, but also the people around you, and embody that... so that people really see it as not just theory."*

**Self-awareness** – an understanding of what motivates you, what is your 'sweet spot', what are your strengths – is also considered an important leadership skill, and the foundation for understanding others and facilitating collaboration and engagement.

The L&D team are **committed and motivated** by a real desire to make a difference, to

implement programmes that they believe in. *"I have never worked in a team that so openly shares common values and are driven by the same desire to shape something which is really extraordinary. We all want to have an impact on the leadership culture of Siemens and you know how difficult it is to change behaviour."*

The Head of L&D at Siemens brings a range of skills to the role. He is both **challenging** and **intuitive**, identifying and naming organisational patterns and needs. *"And I think they, in a way they know we just named reality that was there anyhow, and that was, so far, maybe a bit of a blind spot at Siemens. And what I might have done, I just realise now, I might, a bit earlier than the rest of Siemens, have intuitively identified this blind spot. And now it resonates with people."*

Bringing an 'unconventional' provocative perspective is also considered to be a critical element of the L&D role within the organisation, one that balances challenge with support. *"If you see the organisation as the pearl, you're the grit that forms the pearl. Because the grit is always nasty and challenging...but you just have to make sure that you don't get rejected."*

The Head of L&D at Siemens takes a **holistic approach** to L&D, rather than purely focusing on skills development. He perceives the organisation as a whole, identifying cultural patterns that need changing and challenging the organisation to take an **organisation development** approach to L&D. *"We're very much an engineering culture so people are very technical, task focused, content focused. And as much as for them individually, emotional intelligence is the blind spot, then for the organisation sometimes these patterns are a blind spot. It would definitely help a lot to talk more about how are we working with one another and how engaging this is. So step by step I think we are now having more of these conversations. But I'd say probably I'm the person who's bringing the most experience in change management OD into Siemens. But it's not a very official hat or task. We don't have a functional centre called OD. It's just something that I try to breathe wherever I am working with people, as a mind-set."*



## CASE STUDY: B&Q

B&Q are the largest home improvement retailer in the UK, employing more than 30,000 people nationwide. At the time of the interviews they had begun a large organisation development process, including a restructure of the HR and L&D function, which was continuing to evolve. They were selected as an example of best practice based on their transformation of their organisational strategy, high staff engagement scores, *HR Magazine* Gold Award 2010, and Gallup Great Workplace Award for the fourth year running.

### The HR function

The HR function at B&Q is led by an HR Leadership Team consisting of specialists from across the different components of the function. This team reports to the Board Director. HR operates on a business partner model, with Divisional HR Managers partnering the Regional Managers and Divisional Directors, offering a central point of contact for all matters relating to HR, from recruitment to L&D. These HR Managers are close to the business reality for these regions and divisions, developing an understanding of what they need, and they in turn partner with the relevant HR functions such as reward or L&D, bringing in the specialists where appropriate. *"I think it just helps when they've just got that one relationship, to really make sure that we get the right people in at the right time."*

The partnership approach between HR and L&D has helped to connect L&D to the needs of the business. *"L&D business partnering with HR just has removed any boundaries, any colloquialisms, you know, it's just helped us form as a really strong function, but connects L&D very quickly to business need."*

In response to the changing environment B&Q were re-shaping the organisation, and HR and the HR Director were integral to that process,

to the development of the new organisational strategy, and to the establishment of people at the heart of the business. Part of this reorganisation saw a shift from a divisional approach to L&D to an integrated L&D strategy for the whole of the business.

### History of the L&D function

In the past, the approach to L&D had been somewhat **ad hoc** and inconsistent. *"They always seemed to be spread so thin, that they were chasing themselves ... no sooner had they moved on from one project they were going on to another one, and haven't had time to really look at whether what they'd done had embedded."* This impacted the credibility of the L&D function as they were reportedly seen by some as a 'jack of all trades' rather than experts. Similarly, there was for some a perceived lack of clarity around how L&D could support the vision of the organisation or help individual functions to meet their business needs. *"I'm not sure that the interaction between the functions and L&D was cohesive enough to end up with an offer that necessarily met the needs of the function."*

### Approach to L&D

#### *Development of the L&D strategy*

Now the L&D strategy at B&Q is **agile** and **adaptive**, flexing to the needs of the business. They operate a rolling three-year business plan which is concrete for the first year, but more flexible in the second and third years, allowing it to adapt to the iterative and emerging nature of the business. *"For an L&D function you need to stay agile and flexible. And what I mean by that is the business is forever changing and the needs are forever changing, particularly in a retail business like B&Q. And I would say, for any L&D function in that kind of environment,*

*you need to stay one step ahead of what's going on in the industry."* Critical to this agility are close connections both internally with those on the ground, and externally with what's going on in the broader industry.

These connections also help ensure that the **L&D strategy is aligned to that of the business**. Connecting with retail ensures that L&D are talking the same **commercial** language as that being spoken in the stores, and connecting with senior management ensures L&D understand where they want to take the business. *"Understanding where we want to head as a business, what's our next three to five years, to make sure that, actually, the L&D strategy is bang in alignment with where we're heading as a business."*

Rather than a preconceived plan of what will be right for the organisation, the L&D strategy is determined by an **understanding of what the business needs**, what local divisions and functions need, and from that identifying how and where they can add value, what the 'people' solution might be to meet the individual divisional strategic plans. *"Rather than go out and go, 'Hi, we're L&D, these are all the things that we can do, we're trained in this, we're trained in that, we're trained in the other, and sell your wares'. I'd flip it on its head and go in and get to know your business, get intimate with your business, understand where your business is going, and then work out how L&D can add value, rather than sell what you've got on your shelf."*

Identified as critical to the impact of L&D at B&Q is their ability to fundamentally connect with what happens in the stores, on the ground, with the customers. *"It's about being engaged and involved in what we're trying to do in the stores, because the reality is to B&Q that it all happens in the stores. Without the stores we don't have B&Q. So it's about L&D being really connected to the people who work in the shops."*

### *The development process for L&D activities and initiatives*

L&D activities and initiatives are developed in **collaboration**, between L&D and the division, region, or operational function, ensuring that the **content is aligned with the business need** and brought to life through the expertise of the L&D specialist. *"So the business content, the business owners were from the business side, I was involved in that myself. But a lot of the creativity and ideas came from L&D bringing in the right people to add the difference to it."*

The **focus is on outcomes**, understanding the difference in terms of individual or business performance that the proposed intervention should achieve. *"They'll help you understand what is it you want as your end result, and then help you work it backwards."* *"So the first question is always what do you want the outcome to be?"*

Interventions are **tailored** to respond to local, business unit and participant needs, customising designs to be appropriate for the learning requirements, and customising delivery to really engage and get buy-in from the specific audience. *"I work with L&D to build a training regime appropriate to fit into the boxes that I need them to work on."* *"She's pointing me in the direction of people that can help with funding, to do more development of my team, that I perhaps see fitting in with the style of the division... that feels very refreshing. And along the way, there will be interventions, we'll want to focus on some of our top leaders, and we'll maybe have a suite of options for those leaders ... that is so much better than just having a flavour of the month training course that everyone should go through."*

The number of employees at B&Q, particularly those based in the stores, presents a real challenge for the L&D function in terms of where to prioritise. *"I think ... very much some of the challenges are where they should be making their investment, and how much of their time needs to be on retail and what's going on in the stores and at store level?"* *"Everyone wants you to do everything and be everywhere, so we have a challenge of prioritisation."*

To address this challenge the Head of L&D is working towards getting the team to a position where they can do less but do it better.

The challenge is also addressed by a keen focus on **whether the learning will transfer**, whether it will really add value and generate a return on the investment of both time and money. *“I’ve got a very strong ethic around, if it’s worth doing, adds value to the bottom line. So I’ve got a very strong return on investment head and mind-set that I drive into the team.”*

For L&D at B&Q it is considered important that interventions are reviewed to determine whether or not they are hitting the mark and having an impact, which in turn builds credibility for the function. *“It’s the Holy Grail of L&D, you know, to try and measure and evaluate. And to be honest, I don’t encourage my team to measure the nth degree out of everything. It’s more of a mind-set thing that I am educating my team to have a commercial mind-set.”*

## The Nature of L&D programmes

### *The range, content and format of L&D programmes*

L&D at B&Q offer a **range of interventions** from core basics around tills or software, product and sales training, to trainee schemes, graduate programmes, senior management development programmes, and step-change projects. Formal interventions incorporate a range of formats including practical workshops, coaching, and organisation-wide communication events, and are typically run in-house with some external input which is customised to be congruent with the language and culture of B&Q. *“Taking the best bits out of the industry and bringing it in pragmatically, into the business ... we use a lot of stuff that’s come externally but we package it in a way that’s palatable for B&Q.”*

Where appropriate, programme cohorts include **participants from across the organisation**, bringing them together as one team, and developing their knowledge of both sides of the business. *“I started to run some training for both audiences in the same room, and this was*

*all a little bit by stealth because you know it was all, it’ll never work ... And actually it was really powerful, for the times when we did that. And you got Head Office Managers working with Store Managers, in the same room, around influencing skills, for example ...*

*There was a double whammy learning actually. They were learning about the content, but they were learning about the business.”*

### *Impact of L&D initiatives and programmes*

Impact of L&D initiatives was reported at an individual and cultural level, as well as in terms of impacting the attitude of the organisation towards the L&D function. Interviewees reported demonstrable **changes in behaviour**, and benefits to individual **personal development**. *“It’s quite evident from some of the people that the programmes had an impact and you can actually see them operating in different ways.”* Culturally, **the language used on some L&D initiatives was starting to embed** across the company, helping to develop clarity about the strategy and direction of the organisation.

Some L&D initiatives were also highly **visible**, helping to position L&D as central to developing the organisation. *“They’ve certainly had a high profile I think, in the business, and I do think it’s created a sense of optimism and a sense that we’re changing the organisation ... then I would say, yes, I do think that they are valued.”*

## Organisational attitude towards L&D

### *Senior management commitment*

L&D was reported as being seen as an **important vehicle for propelling the business forward**, and has received significant investment over the past ten years. *“And that’s the fortunate place we’re in. We’ve got a good level of investment from the B&Q Board. They believe in us. They believe in what we do.”* This commitment is made explicit in the **involvement of senior management** in some L&D activities, co-designing and co-delivering

sessions, feeding back around planned initiatives, and inputting into the strategy for L&D. *“So our relationship with retail and the guys that are running the business is hugely strong. We get them involved when we are writing our plans and vice versa. So it’s all you know ... it’s a joint plan. So our retail plan is a joint HR and Ops plan.”*

### *Culture of learning*

The L&D function at B&Q are working to embed a culture of learning across the organisation, developing a mind-set that learning is a **continual process** that doesn’t have to manifest only in the classroom. Indeed, only 20% of learning at B&Q comes via formal intervention from L&D. 40% comes from line managers, learning on the job, or through interaction with peers, and the remaining 40% through self-directed learning. *“It’s a mind-set we have about, learning doesn’t always have to be in a classroom with somebody who has got a learning and development job title.” “I spend a lot of the time trying to diagnose actually what they’re saying, and understanding is it the L&D proposition we need or is it something within our own capabilities as leaders, or within ourselves?”*

In service of this mind-set, L&D at B&Q are developing **advocates for learning**, equipping individuals to share and cascade learning to their peers, producing a ripple effect through the organisation. *“So we’re trying to fuel that culture by saying: don’t just wait for us guys. We’ll equip you, and we’ll help you, and we’ve certainly got our hand on your shoulder to help you to do that ... and we’ll give you expertise, knowledge, and the encouragement. And we try and get them to pass that on to their colleagues.”* This approach is supported through **recognition and reward** to encourage and motivate individuals to consider it as part of their role. Line managers in particular are being developed to facilitate workshops and train their own teams. *“I think it gives real accountability for developing your own people, that’s a huge plus for me. I think that puts the ownership into all of our hands to develop each other.”*

The **role of the line manager** at B&Q also involves both performance management and people development, encouraging learning, providing feedback and coaching, engaging in that development, and supporting application back to the workplace. *“It’s so important that any training that we do, the leader has to believe in it, because if I don’t believe in it, then I’m not going to be talking about it and the Regional Manager’s not going to be talking about it, and therefore it will just be another course ... If we invest in people’s development, we’re all able to support with that after the intervention’s happened.”*

Individuals are also encouraged to **take responsibility** for their own personal development, and to take and create opportunities to learn. *“What we focused on as part of being the best you can be, which was about you actually – you need to spend some time thinking about your development, otherwise you’ll never be as effective as you could be.”*

## **The L&D function**

### *The role and perception of the L&D function*

L&D at B&Q operate as **business partners**, partnering Regional HR Managers. This allows them to stay close to the business and provides the managers with a ‘people’ resource focused at their local level with whom they can develop an understanding of their needs and tailor interventions to those needs. *“The RMs for example, who are quite senior leaders in our business, truly value that role, they get some one-to-one time. It’s about them, they lead that meeting, which we’ve not had before. So I think that it’s moved from just delivery to they help us think, a lot.”*

L&D professionals are regarded as **learning specialists**, diagnosing learning needs, identifying capability gaps, and developing talent, as well as delivering and facilitating workshops. *“How do we nurture talent, how do we grow our business, how do we recognise leadership and management, how do we recognise opportunities within our colleagues,*

*and how do we give them the right framework to grow and to develop? So that's what I call typical learning and development. It's more around how we develop our team, develop our staff, and develop our capabilities."*

L&D also offer both **coaching** and **consulting** to the Regional Managers, Directors and the Board, supporting them in their decision making, and personal development. *"I think the RMs, as I say, would see them as someone a bit like a personal coach, so someone that they can confide in, someone that can talk about them, for a change, that can help them come to be the best they are, they can be."* They also input into developing frameworks to deliver the organisational strategy and vision at a local level.

L&D professionals at B&Q are also perceived as **change agents**, involved in and influencing the recent organisation design process, communicating and engaging staff in change, supporting the process, as well as being instigators of change. *"The relationship I've got with our CEO is that sometimes he does use us as an instigator of some change as well as a follower of change and supporter of change."*

The organisation's perception of the L&D function is reported as positive. The L&D function are perceived to be **adaptable** and **aligned with the organisational strategy**, and their capabilities and skills are **valued**. Whilst described as more reactive in terms of local development needs, the function was described as **proactive at a macro level**, in terms of developing pan-organisation business initiatives. *"I would say their worth in this organisation is massive, and I think the fact that the plan, the strategy and the plan, is now completely aligned feels great. And the relationships feel strong. So, yes, I think learning and development has played a massive part."*

#### *The capabilities and influence of the L&D professional*

**Developing relationships** were reported as an important factor in L&D's ability to influence the organisation. Developing relationships and engaging different stakeholders across the business help to ensure that they develop a nuanced understanding of the business

and can get others on board with what they are hoping to achieve. *"I use a lot of my relationships, that's certainly an influencing strategy, and if I don't have a strong relationship with somebody, I know somebody who has, so I'll use relationships in a lot of cases."*

The Head of L&D in particular, has also developed **good relationships with the Board** which helps to ensure that she is part of the critical conversations, and is consulted and involved in Board level discussions.

The Head of L&D's influence is also greatly facilitated by her **past experience** of and **successes in the business**, which helps to develop her credibility and others' trust that she will deliver. This experience has afforded her a good grasp of the business and has increased her **visibility**, resulting in her contribution being **valued** and requested. *"she adds good value in that space, go and ask her, ... Because I've been seen in a number of different roles around the business, my credibility is out there, my visibility is out there, and I get utilised because of that."*

This past experience, as well as many years working in L&D has helped her to get a good **working balance** between the commercial needs of the business, the reality of the shop floor, and learning and development requirements. *"So she is very balanced. She is very realistic. She understands business, she understands what it is like to be in a shop. And that doesn't mean that she's worked in a shop, she just has a way of just getting to reality quite quickly. And that's how I operate, I don't live in a fluffy world of HR, I live in the real world of shops. So for me she brings a real balance for us."*

Her credibility and visibility have also had a significant impact on that of the function as a whole and its ability, as an entity, to exert influence. *"As I stand out, when I've been going round and listening to people, credibility was lacking before ... L&D wasn't necessarily involved in some things that they should have been, or it was involved too late to influence it. What my team are expressing to me now is, since you've been around, we're involved a lot earlier, we've involved in much more."*

The Head of L&D brings a variety of skills to the role, and was described as **inclusive**, **hands-on**, and **calming**, able to diffuse the emotion from a situation and help focus on finding solutions. She was also described as both **pragmatic** and **challenging**, able to offer a different perspective, and pushing back when she can vision an alternative approach. *“She just gives a different perspective. I think she’s realistic enough but removed enough to just throw a challenge into the room which just gets great conversation going.”*

### **Addendum: B&Q 2014**

The organisation development journey at B&Q has continued since the interviews were conducted, and most notably, in October 2013, four of the six board members departed, including the CEO and HR Director. The Head of L&D was asked to take on a dual role and is now also Head of Business Communications, tasked with helping the Board create the story of the strategy for B&Q and engage the business in that strategy.

These changes have presented both challenges and opportunities for the L&D function. New relationships have had to be developed with the new Board members before real movements could be made on the L&D agenda. Developing these relationships has again been facilitated by the Head of L&D’s commercial background, particularly given that the new CEO has a financial background rather than the HR background of his predecessor. The changes have also necessitated a restructure of the L&D function, which has forced the function to prioritise initiatives and to up their game and the capability of their people.

The additional role also places the Head of L&D at the heart of determining what the vision and strategy of the organisation is, greatly facilitating the alignment of the L&D strategy with that of the organisational strategy of making B&Q a simpler place to work and to shop. The two roles also ensure that L&D remains high on the agenda and has helped to unlock some of the previous blockers to the L&D strategy. Similarly, the dual roles have accelerated the development of relationships with the Board who needed her engagement in communicating change across the business, before they were in a place to talk about learning and development.

# CASE STUDY: AXA AUSTRALIA

AXA S.A. is a French global investment, retirement, and insurance group headquartered in Paris. AXA is a conglomerate of independently-run businesses, operating according to the laws and regulations of many different countries. The AXA group of companies engage in life, health and other forms of insurance, as well as investment management. The group operates primarily in Western Europe, North America, the Asia Pacific region, and the Middle East. AXA Australia was selected as a best practice case study because the scores for the development support increased dramatically after their new approach to L&D.

## The HR function

The role of HR at AXA Australia is particularly comprehensive, responsible for all elements of people, including leadership development, succession planning, talent management, pay and reward, and industrial relations. Learning and Development operates as a team within that function, partnering with Regional HR Managers to develop targeted solutions.

## History of the L&D function

In past years the approach to L&D at AXA Australia was fairly **ad hoc** and inconsistent, with a variety of interventions on offer around competence development, leadership or building teams, but which did not connect together. Attendance was often compulsory and impact reported as low. *“Ten years ago my team would have probably all had to do one course each per year. That would have been thrust upon them and they would have got very little out of it.”*

Development was primarily event-based, there was little clarity around what L&D was about, and there was a high level of reluctance and

resistance towards learning. *“When I met with the Leadership Team members some of them were quite reluctant to do any kind of actual learning at that stage. They had bad experiences of learning. They thought it was a waste of time and a lot of people came up with ideas that didn’t go anywhere.”*

## Approach to L&D

### Development of the L&D strategy

The L&D strategy at AXA Australia is **adaptive** and designed to respond to the changing needs of the business and ensuring that activities are **relevant to the immediate business challenge**. This is achieved through asking the right questions of the right people, with real insight and understanding of the business to establish what is really important and relevant. *“We then started asking slightly different questions of people, which was, what are the business challenges you’re facing and what are you going to face in the next six months? And, again, we spoke to pivotal people that we thought of as having very deep insight in the business, and we came up with five or six key challenges.”*

Rather than leadership development being about attending programmes, the focus is very much on applying learning day-to-day to resolve the immediate challenges of the business and develop an offer that helps leaders be more effective in responding to those challenges.

This shift of focus helps to engage otherwise reluctant executives in leadership development because rather than a process of compliance, development is directly applied to the challenges they need to resolve. *“When we talked to each of the other execs it became very obvious ... could see the way that ... their atoms were spinning with change. The eyes would light up, the physiological signs were*

*there, the attention. One of the execs, someone who had always been resistant to leadership ideas, because ultimately for him it probably got in the way of the immediate needs that we had, operationally focused, then started talking about, well if we did this and if we did this. So there was an entirely different level of engagement in the possibility.”*

This adaptability ensures that the **L&D strategy is very much aligned with that of the organisation**. People development has become about how leaders at AXA Australia can deliver the organisation’s strategy.

*“Where this becomes quite powerful is because the leadership strategy is now actually not just notionally aligned to the business strategy, not just talking about it, not just encouraging it, actively working on it.”* This helps to ensure participants understand how to connect learning to the business and as such adds more value.

Part of the L&D strategy is to develop a common, **coherent leadership framework** that will provide a red thread through the organisation offering clarity around what leadership attributes and behaviours are expected, and **embedding a common language** at all levels, breaking down silos and introducing a commonality across the disparate parts. Leadership is considered to be universal, and incorporates self-leadership, and as such the framework applies to everyone in the organisation, and is translated into performance discussions. *“This is the guide that would connect people up and they would see all the threads running right through the organisation, they would understand what their responsibilities were as managers, as people leaders. They would understand and be able to be self-guided around their leadership.”*

#### *The development process for L&D activities and initiatives*

The process of developing interventions is **collaborative**, exploring different stakeholders’ perspectives on the challenges of the business, and obtaining their feedback on how initiatives are progressing. As well as helping them to understand what is relevant, this approach

also has the benefit of validating the models being developed and getting people engaged in learning. *“Collaborating, engaging in feedback ... was having a big impact on how people were now taking ownership for it.”*

The development process is **thorough** and **iterative**, building on research around effective leadership and sustainable leadership development, and incorporating feedback from stakeholders, managers, and staff, regarding what’s working and what isn’t, what resonates, and what’s missing, into the design of the programme.

Development of L&D activities at AXA Australia is very customer-centric, **focusing on the outcomes** and requirements of the business unit that the initiative is designed for, developing and tailoring solutions to meet those requirements, and determining how to add value. *“We’re not selling you a product, we’re not selling a module, we’re starting with your business needs and then acquiring a suitable solution.”* Rather than rolling out initiatives across the business, roll out is ‘adaptive’, targeted where there’s pressing need, particular challenges, and specific capability gaps.

There is a strong emphasis on **learning transfer** at AXA Australia, translating leadership concepts into tangible behaviour, and supporting application of learning through practice, reflection, and coaching. Follow-up sessions track behaviour change to explore what has been learned and applied. *“So there were various reconnect-type sessions with these people and their managers to see, well, what are these people doing differently? Have they – coming out of the different programmes – are they now managing in a different or more effective way? What are they actually putting into practice?”* Success stories are shared from some programmes to demonstrate the impact and value of learning.

## The Nature of L&D programmes

### *The range, content and format of L&D programmes*

AXA Australia offers **activities across all levels** within the organisation, from junior to senior managers. Content includes topics such as navigating and exploring the impact of change, understanding yourself as a leader, business and strategic leadership development, coaching and mentoring, and senior leadership programmes.

Initiatives involve a **variety of formats**, including reflective, shared learning for intact teams; practical, application-focused workshops translating theory into action, and experiential learning. The focus is on developing open and safe learning environments in which participants can share their experiences and develop real personal insight. *“We’d get them to share their experiences with each other, and that’s incredibly powerful. And actually put the key emotional pieces on sticky-notes. And they all compare each other’s journeys. And all the journeys, whilst they had different emotions at different times, they followed this really strong pattern. And so it creates this very powerful connection between the people in the workshop. And it’s done on a dialogue and reflective basis, so people were really appreciating and enjoying that, and the way of them really learning from each other and using the wisdom of the group to reflect on how they’re going to support their people going through change.”*

Learning guides and journals are developed to accompany programmes and to offer guidance on the development opportunities available both formally, and within the day-to-day role, and to encourage active reflection on that learning. The majority of programmes are designed and delivered in-house. Whilst this has the benefit of reducing costs, keeping the context of the business in the room, and embedding the learning across the organisation, one challenge for L&D at AXA Australia is that internal training is not always perceived to be as valuable as that provided externally.

### *Impact of L&D initiatives and programmes*

Impact was reported at all levels, including individuals, teams, and the organisational culture. Individually, participants are seen to be actively using their learning, and applying the tools to their jobs. Programmes are helping to develop individuals’ **self-awareness**, their understanding of their strengths, development needs and personal leadership skills, and **improving their leadership capabilities**.

*“The leaders that have gone through these programmes are more in touch with themselves, they are more genuine and open, and they rise to the occasion, not afraid to have difficult conversations. The effectiveness and communication improved.”*

The programmes were also reported to be impacting employees’ **engagement** with the organisation, which is recognised as a company that invests in their development. Similarly, the benefit of development to individuals’ ability to do their jobs is now understood, generating a buzz around the organisation. *“People are now requesting participation or requesting workshops without our needing to spend a lot of time promoting what we have to offer. To me, that tells me we’re finding that sweet spot. People are experiencing the value, they’re realising it’s making a difference in terms of their ability to respond more effectively to the challenges they face or the opportunities they’re seeing.”*

Programmes are described as **transformational**, impacting individuals beyond their sphere of work. *“Without a doubt this was the most impactful experience for me, but also for my wife, my siblings, my colleagues etc. It goes beyond the experience you have when you go out for just a couple of days for all the other ‘normal’ programmes. They really look at the person. The course was a life-changing experience, had an effect on me personally. It is very transformational. I would say the courses are enlightened.”*

Culturally, the L&D initiatives are having an impact on how people treat each other, within teams and across the organisation, and encouraging **collaborative and robust dialogue** that is changing the way that problems are resolved. *“He said he has*

*certainly noticed within the team, it's actually the dialogue as a team that's changed quite considerably. He said they're much less likely to blame someone else, they're less likely to whinge, and they're much more likely to look for their own solutions. So he's actively seeing it within how the team are interacting."*

The language used on programmes is becoming embedded across the organisation from the top down, helping to **create a shared understanding around what leadership is.**

*"But the reason it has created the impact is because it's come from the top, and it's language that now everyone uses. So it's language that's ingrained within the culture. So principles of straight talk, principles of victim versus responsible mind-sets."*

## The attitude towards L&D

### Senior management commitment

It was reported that as an organisation, AXA Australia **recognises the importance of learning and development.** The Leadership Team believes in what the function are doing, and can see the benefits of their activities. Through successful programme roll-outs a body of advocates has been developed who are **engaged in and committed to development,** championing it throughout the business. To illustrate this engagement, the Head of L&D described the setup of the Leadership Advisory Committee, a group of very senior managers brought together to navigate the leadership ideas and initiatives being rolled out through the business. The committee was supposed to rotate after 12 months: *"Then 12 months after we spoke about it every single individual said they did not want to rotate off it, they wanted to stay on. Because they had a massive positive learning experience on it, and to them the dialogues that we had were invaluable. And they actually started doing more things with their own teams and actually building their own leadership capability in their own teams. And it's just a fantastic story about how they've actually shifted just through keeping and engaging in dialogue."*

As well as involvement in the dialogue around L&D, senior management are also actively supporting it through their investment and involvement in activities. *"So at that point, because of the Strategic Leadership Programme, there started to be a growing body of advocates within AXA Australia. So this was now, we've run four or five programmes, about 100 to 120 people, who were saying this is fantastic work. We need to lead this business in a different way."*

### Culture of learning

There is recognition at AXA Australia that effective development takes place in the **context of work,** and the further removed from that context the less effective it will be. Initiatives therefore are developed through the filter of this lens. *"Leadership in Action was a way of emphasising that development and leadership are the same thing, and they both occur whilst being applied to the context of our work. So we can learn things in a workshop, but the development is what takes place in terms of the application of what we've learned."*

Through the 70, 20, 10 Model, development is encouraged on the job as well as through formal programmes, through work opportunities, through situational projects, through secondments, self-directed learning, and through reflection.

A strong emphasis for L&D at AXA is to raise the **level of consciousness** around development across the organisation. Development is perceived as something that occurs continually, and requires engagement at all levels – the individual, the manager and the organisation – to be effective. *"To me you can cut this and dice this in a million ways. But it comes down to three things: the organisation must encourage it, champion it, and provide the space for it. The managers must actually engage in it, be part of it. And individuals have to have a sense of efficacy and responsibility to go on the journey. And if you don't work at all three levels at the same time, you're kidding yourself, you're dreaming. And you just create pockets of resistance."*

Individuals are encouraged to **take responsibility** for their own development, are given the support and space to try out new behaviours in a safe environment, and helped to recognise the lessons to be **learned from failure**, and to develop the **self-efficacy** to create the opportunities to integrate what they've learned into their work. *“Not just the formal side of development, it's also helping people see that business challenges are development opportunities. That when things go wrong, when the shit hits the fan: development opportunity ... The experiences we have at work, whilst they might be the nature of the work, they are at the same time also a developmental opportunity. So if we can bring that attitude or that approach to what we do that also then changes the nature of the experience. That's the attitude that we're seeking to instill.”*

## The L&D function

### *The role and perception of the L&D function*

The organisation's perception of the L&D function is reported as very positive. The leadership team are engaged in what the function are doing, the CEO is bought in and the team are regarded as **credible experts**. *“Now you asked, how do we know if we're successful? One of the biggest, I would call success indicators, is when people say, we don't need you to explain to us what you're offering. We trust what you offer. We know that it works. So when there's that implicit level of trust then we're doing something that's resonating.”*

Their role is primarily that of **specialist**, partnering with business managers to develop tailored interventions, building their capability and delivering workshops, as well as facilitating dialogue around challenging issues, and creating opportunities and a safe environment in which leaders can have robust, challenging conversations. *“And it had this really strong reaction and very, very, aggressive discussion which some people in that room didn't necessarily have the maturity to deal with. And so my role was not to dampen it, but it was*

*just to navigate it, to allow some space for it to happen, for then to bring it back to what was recorded. So the feedback from that session was, I suppose, absolutely seminal in some ways ... because the organisation allowed this to happen. Rather than repercussions, or shutting down, it was accepted that really difficult conversations needed to occur.”*

An additional role of the Head of L&D at AXA Australia is also that of **personal coach and mentor** to the senior directors, working with them around their personal development, and their team and organisational challenges.

### *The capabilities and influence of the L&D professional*

**Developing relationships** is a critical means by which the Head of L&D at AXA Australia develops his influence. Getting to know senior leaders personally fosters trust and enables him to challenge and push back. *“I think that's part of his strength as well, that he's made these professional relationships develop into a situation where we trust him to give us that challenging feedback from time to time.”*

Similarly, through these relationships with the senior team he is able to **get their input and engagement** in ideas as they form, helping to get their buy-in and support once the proposal is complete. *“He is very good at being able to get support when an idea is just an idea, before it gets too down the track and, therefore, when people then see the idea grow and evolve, it's familiar to them. And I think he's very clever in doing that, because then he's not showing them a product that's complete, he's getting that stakeholder buy-in from day one.”*

Through these relationships he is also able to develop an **understanding of what is important to the senior management team**, what it is that they need, facilitated by his **commercial knowledge** and use of language which is congruent with theirs. The Head of L&D also combines a background of technical, business experience, including strategy, finance, IT, mergers and acquisitions, and OD, with an in-depth, proactively self-developed capability around learning and development, communication, team-building, and

self-awareness. This combination helps him to apply the business context to learning and the learning context to business.

What is also important to his ability to influence is **demonstrating the impact of L&D initiatives** through piloting programmes, getting feedback, building on those foundations to develop more, and using managers who have gone through programmes as protagonists and advocates for learning and development. *“He’ll then use my experience as a bit of an advocacy for the other managers. And I think that’s a really powerful way to seed us with ideas of things we can do ... He uses us to advocate for them once we’ve gone through them.”*

He is also able to effectively and **engagingly articulate** the benefits and value of proposed interventions. *“What he did well was, really had a compelling story to tell about the impact of running a leadership development, and what it would do for the organisation, not only for the stakeholders, but for customers, for shareholders, for advisors, for staff. And he sold that story to our CEO and the CEO’s direct reports.”*

His **energy** and **passion** were also reported as inspiring, influential, and infectious, helping to carry his argument. *“I think that you can’t help but notice that he truly enjoys what he does each day, and goes around smiling. He’s committed to making a difference within the organisation. I think he derives a lot of his influence from the fact that you can’t possibly think that he has a motive other than just pure enjoyment.”* He is described as **authentic**, an active listener, and genuinely interested and engaged in other people. He is driven by a real passion for L&D which has been a powerful tool in getting through what he wants to do. *“He lives and breathes L&D (for over seven years now). Credit must go to him for identifying a gap in AXA Australia’s L&D, and his commitment to deal with that. His dedication and passion and his persistence made the difference.”*

The Head of L&D is perceived as a **credible, pragmatic** expert who has ‘transformed’ L&D at AXA Australia. *“He is very effective and is continuing to improve AXA Australia’s culture.”* He was described as inclusive, open, and honest helping to develop a level of trust that ensures others too can open up to him, in turn facilitating their personal development.

Also important to the L&D professionals’ capability and credibility is that they are seen to walk the talk, to **model the learning behaviour** they expect from others, and to mirror those behaviours. *“Unless we’re modelling in ourselves what we’re asking others to do, we’ll never be aware of any incongruence. So we added that as a lens on what we’re doing. So are we going about what we do in the same way as we’re asking others to learn and develop?”*

### Addendum: AXA Australia 2014

AXA Australia was part of the AXA Asia Pacific group until March 30th 2011. It was then sold to the AMP Group, and no longer exists as an entity.

# DISCUSSION AND RECOMMENDATIONS FOR PRACTICE

This final section summarises the themes which emerged from our interviews and considers the implications for L&D professionals in terms of overcoming the challenges they face in establishing themselves as strategic partners and exerting influence in their organisations.

## Patterns across the case studies

### *Approach to L&D*

All our participant organisations shared a similar approach to learning and development. Their L&D strategies were agile and adaptive, closely aligned to the current challenges and needs of the business. Initiatives were developed in collaboration with departments and business units, HR managers, and operational managers to ensure they were tailored to specific needs and audiences. The focus was primarily on outcomes, identifying what good looks like, and working backwards from that point. There was also a strong commitment to effective learning transfer, ensuring learning was applied, supported, and followed up to maximise the value and impact of the development.

### *The nature of L&D programmes*

Interventions were offered across all levels of the organisations, covering a wide range of topics and incorporating a wide variety of formats. The most effective programmes were practical, designed to stretch and challenge, but in an environment that was safe for taking risks. Impact was felt at both an individual and cultural level. Individually, programmes were impacting personal development, leadership capabilities, and self-awareness – impact which often extended outside of the work environment. Culturally, the programmes encouraged more robust dialogue, greater challenge, and the development of a shared language, resulting in a palpable energy and buzz around learning and development.

### *Organisational attitudes towards L&D*

All three organisations cited the importance of support and commitment from senior management for learning and development, support often reinforced through investment, and through their involvement in either the design or aspects of delivery of the initiatives. L&D had created in them, and in line managers, advocates for learning, who shared and cascaded learning to their peers. All three companies had developed a tangible culture of learning – a ‘level of consciousness’ where learning became a continual process most of which happened outside of any formal L&D activity. Individuals were encouraged to take responsibility for their development and to learn the valuable lessons from failure.

### *The L&D function*

The roles of the L&D professionals within all three organisations were wide ranging, from credible expert and specialist, to coach, mentor and change agent. Their strategies were perceived as proactive, aligned and adaptable. The primary tool employed by all three to develop and exert influence was developing relationships, through which they could obtain a detailed understanding of the business and its needs, and engage senior management in their activities. A commercial background and/or commercial knowledge facilitated their engagement in strategic discussions, and helped them to offer a balance between the needs of the business, and learning and development requirements. Heads of L&D were described as pragmatic, passionate, and committed. They practised what they preached, were prepared to challenge the organisation and senior management, and were able to identify and name organisational needs, and push back when necessary.



Figure 1: Multi-faceted role of L&D

### Implications for the L&D professional

As discussed in the introduction to this report, Leadership Development practitioners across the modern world are faced with a variety of challenges to establishing themselves as strategic partners and exerting influence in their organisations. These challenges include a need to develop the skills to engage in strategic conversations, the ability to align initiatives with organisational strategy, difficulty in demonstrating or influencing the impact of their activities, and a lack of perceived credibility in the eyes of senior managers. This report will now conclude with an exploration of how L&D professionals can overcome these challenges.

Through our conversations with L&D professionals and senior managers within the three companies, it emerged that in order to establish oneself as a strategic partner, to develop the trust and credibility required to influence and to challenge, L&D professionals must develop themselves in three critical domains as depicted in Figure 1: they need to be the 'grit', the trusted advisor, who 'irritates' and challenges the organisation; they need to be the learning expert, the specialist who understands how individuals learn and change their behaviour; and they need to be the organisation development expert, able to translate individual change into change at a systemic, organisational level. We explore each of these roles in turn.

### *Being the grit: the trusted advisor*

Many factors were discussed by those we interviewed as being vital to the development of their influence within their organisations, but the most important was the development of **relationships with critical stakeholders**. This appeared to be at the heart of becoming the trusted advisor. By developing relationships with a wide range of individuals, including senior managers, HR managers, and line managers, the L&D professional is able to develop a nuanced understanding of what the business needs, and through this understanding, produce a strategy which is agile and aligned with that of the organisation, and initiatives which are relevant to current organisational challenges.

To be able to develop these relationships, engage in real, challenging dialogue with senior managers and foster the necessary credibility requires **personal** development on the part of the L&D professional, development which focuses on **self-awareness, personal impact, influencing and consulting skills**, in order to develop the necessary confidence, courage and ability to challenge where needed (Lesser, 2006). Similarly, if L&D are to be seen as credible learning experts they need to **model the learning behaviour** they expect of others.

What also appears critical, and indeed facilitates the L&D professional's ability to develop these relationships, is a credible **commercial understanding**. This enables them to talk the language of senior managers, engage in and understand those strategic conversations, and know how to connect these business needs with learning and development requirements at an individual or local level. As Young (2010) and Sheppard & Knight (2011) argue, L&D professionals need to learn the language of business, and talk in terms of cost, profit, and productivity when discussing the value of their interventions.

This understanding of and alignment with business needs in turn results in L&D offerings which have real value and impact on business outcomes, further enhancing the credibility of the function and the L&D professional. This greatly increases the likelihood that they will be consulted by senior management in the future, and be in a position to challenge and

to influence the organisation. Developing their **credibility**, therefore, is critical to their ability to exert influence within their organisations and to their ability to position themselves as strategic partners.

### *L&D expertise*

A commercial focus should not however, be at the expense of their expertise as learning and development specialists, and a balance between the two is important. This means establishing both an operational focus and an understanding of the role that learning plays in the business, whilst maintaining a position as expert in learning solutions and leveraging insight into how to motivate employees (Bersin, 2008; Hutson & Lucas, 2010, Smith, 2010; Holbech, 2010; Macaulay & Cook, 2010).

What is critical to L&D's role as expert in learning and development is an **understanding of how adults learn and transfer learning**: the importance of motivation and engagement, of designing interventions that are practical and pragmatic, that are relevant and connect with individual's real work contexts, that foster confidence and self-efficacy, and which learners perceive will result in positive outcomes in terms of their work performance or career (Waller, 2011). The commercial understanding they develop through their role as trusted advisor, and their ability to work closely with and in **collaboration** with different departments and business units, will help in this regard, ensuring that their L&D activities respond to identified skills gaps that must be bridged to achieve the organisational strategy, and result in learning solutions that meet the specific, targeted needs of the audience, and lead to real behavioural change as well as organisational outcomes.

This behaviour change however, needs to be supported back in the workplace. **Engagement with senior management** will help secure their support for what L&D are trying to achieve, ensuring it is congruent with senior managers' vision, and that learning, and learning transfer find support back in the organisation. Similarly, **engaging line managers** in the development process, and developing them as advocates for learning, will help ensure that learners are supported in applying their learning and

encounter little resistance to doing things differently (Colquitt, LePine & Noe, 2000).

What is equally important, particularly to the credibility of the L&D professional and to engaging senior management in future activities, is that this **behaviour change is clear and visible**, and metrics are employed which demonstrate how the learning is impacting attitudes and behaviour, delivering business value, and how L&D is meeting organisational objectives, (Hartley, 2010; McKessar, 2012).

### *OD expertise*

The third role that L&D need to fulfil is that of OD expert, a role that is further facilitated by developing an **understanding of the needs of the business**. Through this understanding the L&D professional can link individual needs to organisation needs and develop initiatives which will have real impact at a systemic as well as individual level. Similarly, through the development of a **cohesive leadership framework**, a shared language and a shared understanding of what leadership means can be embedded across the organisation, making learning familiar, behaviour and attitude change less likely to be resisted, and resulting again in change at an organisational level. As such, it is important for L&D to develop the skills necessary to **support both individuals and the organisation through localised and systemic change**.

In support of this the L&D professional needs to **promote a culture of autonomous learning**, a 'level of consciousness' whereby individuals take responsibility for their own development, supported by L&D. In this way learning and development becomes a natural, essential part of the organisation's make up, and learning from day-to-day activities becomes a regular, anticipated element of organisational life.

### *A virtuous cycle*

It would seem that in order to establish their role as strategic partner and exert real influence within their organisations, L&D professionals need to develop their expertise in all three domains. Becoming the trusted advisor will bring them close to the business, resulting in learning interventions which impact critical business outcomes, and lead to change at both an individual and systemic level.

Our research suggests that Hamlin (2010) may have been right. There would appear to be a vicious, or if leveraged, a virtuous cycle in operation that has a fundamental and critical impact on L&D's ability to position themselves as strategic partners, and exert influence in their organisations. At the heart of this cycle are relationships. Through these relationships L&D are able to develop an understanding of the needs of the business, align their activities with organisational strategy, and ensure they develop interventions which will have the required impact. This in turn will develop their credibility, further ensuring the full engagement of senior management in L&D activities, facilitating the continuing development of these important relationships, and helping them to establish themselves as strategic partners and exert meaningful influence in their organisations.

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Research Department  
Ashridge Business School  
Berkhamsted  
Hertfordshire HP4 1NS  
United Kingdom

Tel: +44 (0)1442 841178  
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