



**Paul Kearns** defines a new role for a new type of learning professional and business partner.

## Part 4: How learning consultants become proficient 'cyclists'

In Part 2 of this series, we introduced the PDCA (Plan, Do, Check, Act) system – a closed loop, feedback cycle of measurement, planning and improvement. We combined this with Kolb's learning cycle to make improvement and learning synonymous and simultaneous. This month, we take these principles and apply them to a complete learning cycle. However, only those learning consultants (LCs) working at Stage 4 maturity will be able to introduce this cycle and see the results it can achieve.

The concept of 'cycles' is of paramount importance in learning: if any *part* of the cycle breaks down, effective learning does not

### Paul Kearns

Paul is director of the PWL consultancy specialising in HR and learning strategies that are directly linked to strategic business measures using evaluation and return on investment (ROI) methods. He is the author of several books on training and HR including *Maximising your ROI In Training*, which uses a new approach to evaluation as a basis for all learning and development interventions. He also presents Master Workshops on Evaluation and ROI for *Training Journal*. Paul can be contacted on +44 (0) 117 914 6984 or at paulkearns@blueyonder.co.uk

happen. Therefore, the LC has to make sure every part of the cycle works, from the beginning right through to the end. But where, exactly, is the starting point? Our answer to this, a revised version of the classic training cycle, takes us a significant step away from conventional approaches to training and development, and is shown in Figure 1 (opposite).

I would like to stress, though, that this is not meant to be a 'new' cycle. The 'classical' training cycle, used by all training and development professionals, comprises four discrete phases: training needs analysis (TNA), design, delivery and evaluation. There is nothing inherently wrong with this cycle but there was always an implicit assumption that the TNA phase would only identify training needs that were *directly linked to business needs*.

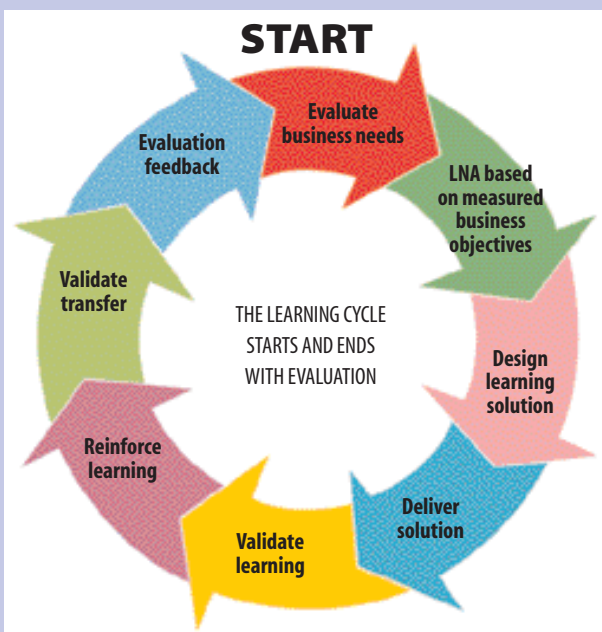
Times have changed and these links are now rarely made explicit in practice; indeed, some trainers think personal development does not have to be tied to the business at all. So our version of the cycle addresses this fundamental issue and puts the emphasis where it should be: right at the start of the business planning cycle.

### THE CYCLE

One thing you will notice about this cycle is that it has twice as many phases as the classic cycle. Let's look at each one in turn.



Figure 1: All learning starts with a business need



**Phase 1: Start – evaluate business needs**

This phase is the most critical and usually the most difficult. Additionally, it will probably take the longest. But the question here is quite simple: ‘What does your business need – more revenue, lower costs, more productivity, greater margins ...?’ If you work for a public sector or not-for-profit organisation the question is the same, except you might use the term ‘funding’ instead of revenue. One thing that can be said about all business needs is that they always have a pound sign attached; after all, everything comes at a cost.



Reinforcement in this learning cycle is the responsibility of **those who own the process**

If you want to talk about a business need in terms of ‘market share’, ‘greater innovation’ or ‘time to market’, this first phase demands that these needs be translated into hard figures so that everyone has the same understanding about how important these objectives are and their relative priority. So, a one-point increase in market share from 5 per cent to 6 per cent ➤

► (a 20 per cent increase in real terms) with existing sales of £10 million will be equivalent to an extra £2 million in sales (assuming the total market does not increase).

Now, before you read any further, take a minute to make sure you understand exactly what has just been stated. Do you know how the actual figures have been calculated? After all, this is about your own professional development and manipulating financial figures is a key part of this programme.

If we look at 'greater innovation' as a business need or objective, it will have to mean, ultimately, an increase in new product sales. There is no point in being innovative if customers do not buy your new product. Alternatively, a 10 per cent productivity improvement, where total direct costs are £7 million, will add up to £700,000 on the bottom line. While we are looking at these figures it is also worth noting that training to achieve any of these objectives falls into Box 2 – 'Added value' – in the three-box system covered in Part 3 of this series.



The whole purpose of the learning cycle is to learn from the experience **regardless of the actual results**

Alongside these improvement objectives there will always be a need to remain compliant or manage health and safety, otherwise known as Box 1 training. Here, the pound sign is one of risk if you do not get it right. Fail to train your life insurance salespeople properly and your company is likely to be sued or fined.

In effect, Boxes 1 and 2 cover everything that is likely to fall under the heading of 'business needs'. So the simple message for LCs in the learning cycle is that they cannot move on to Phase 2, LNA, until the business need has been quantified and prioritised. In fact, if they do not accurately pin down the underlying business need during Phase 1, the rest of the cycle will start from the wrong point. Any subsequent training will not then be directly linked to the business.

Regardless of how crucial this first phase is, I know many organisations that tell me one of their business 'needs' is something much more nebulous and indefinable such as 'leadership', or 'management competence' or even 'team work'. That is why they run leadership programmes, competence modules or team-building exercises to deal with these apparent skills gaps. But how should LCs address this type of need? The answer is very simple: they shouldn't.

'Leadership' is not a business need *per se* and never will be. This does not mean the desire for better leadership is not a valid one. The only problem is they are describing a symptom of a disease, not the cause of it.

Organisations that say they need leadership are really just saying 'we are not performing as well as we could if we had better leadership'. The learning cycle, therefore, tries to clear up the real business need, the under-performance question, before it tries to resolve it through leadership development. We will demonstrate how LCs can address performance issues in Part 6. For now, though, we need to concentrate on doing a proper learning needs analysis (LNA): LCs do LNAs while trainers do TNAs.

#### Phase 2: LNA based on measured business objectives

Very immature organisations run generic leadership training programmes and hope that they will have some impact. Mature organisations, using the learning cycle, link developmental

programmes to measured business objectives. Moreover, there is no pre-conceived assumption that learning needs exist until there is supporting evidence from the business.

Going back to our earlier market share example, the LC has to ask the marketing director right at the beginning of the business planning cycle whether s/he will achieve the planned one-point increase in market share? If the answer received is a straight and confident 'Yes', then a trainer might take this at face value and assume there are no learning needs. However, LCs will undertake a much more in-depth analysis. How is the marketing director going to achieve this increase? New products, a marketing campaign, better advertising ...?

Only when the marketing director starts to show some concern is there a need to drill down into possible learning needs. How about a poor track record of bringing new products to market on time and to the right quality? What has the organisation learned since the last new product launch?

You will already have noticed that this line of questioning is going to take a considerable amount of time and is rarely going to result in a generic learning solution. It is a process for tailoring specific learning solutions to specific business needs. The links will be clear and closely connected.

Only organisations at Stage 4 maturity will be ready for this line of enquiry. However, my view is that just by asking these questions you will improve the way your organisation learns and simultaneously increase the probability of a business payback. Bespoke learning will always prove to be a better investment than sheep dip training.

#### Phase 3: Design learning solution

Regardless of how many questions are asked during Phase 2 in this marketing example they might lead to an analysis of the product launch process. (We will cover process analysis in Part 12.) If this is being led by the LC, then s/he will want someone to own the whole process and to get every key player involved. Why did the last launch not work so well? What was the business impact in terms of costs and delayed revenue streams?

No doubt an operational manager could lead such an initiative, but then it might be viewed just as another operational meeting. The LC would ensure that it was seen as both an operational and a learning opportunity. We will devote the whole of Part 8 to exploring this design phase in more detail.

#### Phase 4: Deliver solution

The shortest and simplest phase of the entire cycle is usually Phase 4. Having agreed on the measurable outcomes (for example, cycle time improvements and launch cost reductions) the delivery phase will entail getting the product launch process team together and facilitating its development towards these agreed ends. Delivery is a big enough subject in its own right to warrant the whole of Part 9.

#### Phase 5: Validate learning

During and after the process team meetings the LC will establish what has been learned and attempt to close the loop.

- Does everyone fully understand the process, its boundaries and business impact?
- Has everyone been involved in re-designing the process?
- Were any key personnel excluded from the original team (for example, product designers)?
- Have these personnel now been brought into the loop? ►

► **Phase 6: Reinforce learning**

Any psychologist or learning expert will tell you all about the importance of the concept of reinforcement and I do not intend to add to the wealth of literature on the subject. Effective LCs will do everything they can to reinforce learning messages. But it will not be the LCs who actually do most of the reinforcing.

Reinforcement in this learning cycle is the responsibility of those who own the process. In this case the product launch head will already have agreed to check that actions agreed were carried out satisfactorily. Moreover, they will endeavour to incorporate what has recently been learned into future product launch plans. This requirement of the learning cycle would have been agreed as early as Phase 3 as part of the overall design.

It is worth pointing out that this cycle is a template. The LC would have explained in advance exactly what was required at each phase. Expectations of everyone involved would therefore have been managed accordingly.

**Phase 7: Validate transfer**

One of the biggest disappointments for any trainer is to see a potentially great piece of training fall at the final hurdle, where the learning is meant to transfer to the workplace. This phase is designed to check application because there are many organisational issues that can thwart the best-laid plans.

We need to ask whether any new obstacles have been put in the way of successful transfer. Perhaps a senior manager pulls rank and says there are to be no changes in the product launch process? Maybe the product marketing team is at the mercy of late information from the technical team, which was not involved in the process meetings?

It is unrealistic to say that all of this should have been anticipated. The whole purpose of Phase 7 is an extra check that the cycle really is working and, if not, to pinpoint where it is breaking down.

**Phase 8: Evaluation feedback**

Phase 8 closes the loop on each turn of the cycle. As we will see in Part 5, what is often viewed as the most difficult aspect of training and development, its business impact, will not be a problem if the whole cycle is designed with this end in mind. In this case, for example, choosing during Phase 1 to use sales figures one month after launch as the main criterion for success will close the loop when these figures are available.

It would be disappointing if the target figure was not achieved, but the whole purpose of the learning cycle is to learn from the experience regardless of the actual results. This just sets up the start of another turn of the cycle.

**LEARNING TO USE THE CYCLE**

As the first step in the cycle is 'evaluate business needs', LCs will need to have developed their understanding of how businesses work in general and their own business in particular. Getting underneath the skin of the organisation to find out what the real business needs are requires highly developed skills, the skills one would expect from a business partner. These will be covered in some detail in Parts 7 and 11.

Sometimes the LC will find that the business is not very good at producing clear objectives and, even if it is, they often conflict. For example, trying to improve quality while simultaneously reducing

**CASE STUDY: How organisations use the Investors in People cycle**

Ever since the Investors in People (IIP) standard was launched in 1991 the notion of cycles has been a fundamental part of the scheme both conceptually and practically. The four key principles of commitment, planning, action and evaluation (see IIP booklet ISBN 1 900567 010, 1996) were intended to link development plans to business plans and be used iteratively. The original IIP literature referred to a cycle starting from 'business objectives' and ending with 'measured outcomes'. IIP is also intended to be a never-ending, continuous improvement scheme. Yet to this day it is the evaluation requirements of the standard that seem to create so many problems for organisations wishing to achieve accreditation under the standard. There are some very simple reasons for this, which stem from a misunderstanding of the cycle itself.

It is a pity, for example, that 'evaluation' was the fourth principle rather than the first. This gave the false impression, quite unintentionally, that evaluation was the last part of the standard – something that could be left to the end. It is interesting, therefore, that management teams often 'commit' to IIP without first having expressed what value they thought it would bring to their business. Such commitment is therefore unsubstantiated.

Also, translating 'business objectives' into 'training needs' is a difficult enough process at the best of times. Without a thorough LNA phase there is always a temptation to jump to conclusions and assume that 'supervisory skills development' or 'management modules' will bring some benefit.

A better understanding of a proper learning cycle should bring greater benefits and, at the same time, set up a continuous improvement process that will stand the firm in good stead for its next reassessment under the standard.

costs is a classic dilemma. Nevertheless, the first step is always business value analysis and the specification of business objectives, and this has to be made clear to your 'customer'.

This cycle is not meant to be a theoretical construct; it's a route map. It should be openly placed in front of your customer and you should explain that each step is critical if it is going to work. Personally, I have absolute confidence in the value of using this

cycle. If training fails it is because someone has tried to take a short cut. I am always extremely assertive in insisting that we try to stick to the cycle as closely as possible.

However, like any tool or technique, it takes time to learn how to use the cycle effectively. I would strongly suggest that you try running through this cycle once with your training team colleagues before doing it for real. How about a piece of basic training on product knowledge? How much

knowledge do they have to have? What measures would you use? Then check that each

element of the learning cycle has at least been considered. For example, what arrangements are in place to reinforce product knowledge?

Even after a practice run you should then only try it with a line manager with whom you get on well and who is willing to work with you while you both learn. As with all learning, building up your confidence is very important. Let the line manager raise any concerns s/he has (for example, who is going to validate the transfer?) and suggest that a small sample will suffice. You would only want to go back to find out why if the results were unacceptable.

Of course, over time the use of such tools and systems will not be stilted and mechanistic but will become part of the way the organisation operates, naturally.



This cycle is not meant to be a theoretical construct; it's a route map

► **LEARNING ISN'T AN INTERVENTION**

Many training professionals use the word 'intervention' to describe any activity generated specifically to teach, train or develop. Most training activities are obviously interventions in the true sense, such as a three-day course on project management. However, even coaching and mentoring can be, and are, described as interventions. The problem with all genuine interventions is that they can jar with the smooth day-to-day running of the organisation. Coaching someone can mean stopping them in their tracks and suggesting a better way to move forward.

One of the more subtle aspects of the learning maturity scale (see Part 1) is that as the organisation matures learning becomes natural and almost subliminal, not interventional. By the time you reach Stage 6 no one would be able to spot the join between the 'operational meeting' taking place to discuss the introduction of new technology and the same 'learning meeting' considering the organisation's previous experience of assimilating such developments.

This is what organisational learning is really all about. Keen learners are always looking for new ideas and new ways of doing things. However, when they try to make these ideas work in practice they immediately run up against apathy, scepticism or just plain old intransigence. This takes all of the momentum out of their enthusiasm for learning. Getting



If LCs can articulate and demonstrate the true value of learning they at least have **a basis for motivating everyone concerned**

everyone in the organisation to respond positively to learning new ways of doing things is never easy and that is why they have to see the real value in learning. If LCs can articulate and demonstrate the true value of learning they at least have a basis for motivating everyone concerned. That is why in Part 5 next month we will look at how to put a meaningful value on learning through the use of evaluation. 📌

**Action points on the learning cycle**

- Ask all delegates on any management development or leadership programme how they will produce evidence to prove that they have learnt something that is beneficial to the organisation. Any evidence produced must be measurable.
- Take a copy of the cycle to the next meeting you have to discuss training needs. Put the cycle on the table and ask the group to use it as a series of steps to guide the discussion.
- Find out how much reinforcement of learning is currently happening. Pick two or three delegates from recent training and ask them how it has been reinforced.

**WHAT THIS SERIES COVERS**

- Part 1 – January:*  
**How learning consultants bring maturity to the organisation**
- Part 2 – February:*  
**How learning consultants think and act strategically**
- Part 3 – March:*  
**The attitude of learning consultants**
- Part 4 – April:*  
**How learning consultants become proficient 'cyclists'**
- Part 5 – May:*  
**How learning consultants can use evaluation intelligently**
- Part 6 – June:*  
**How learning consultants become performance managers**
- Part 7 – July:*  
**How learning consultants become consummate business analysts**
- Part 8 – August:*  
**How learning consultants become creative designers**
- Part 9 – September:*  
**How learning consultants deliver solutions**
- Part 10 – October:*  
**Why learning consultants are always consulted**
- Part 11 – November:*  
**Why learning consultants are business partners**
- Part 12 – December:*  
**How learning consultants design and develop organisations**

To obtain previously published parts of this series, contact *Training Journal* on +44 (0) 1353 654877, at [contact@trainingjournal.com](mailto:contact@trainingjournal.com) or visit [www.trainingjournal.com](http://www.trainingjournal.com)



**Training**  
JOURNAL

Want to hear more from Paul Kearns? Join us and Paul on a *Training Journal* Master Workshop in Evaluation and ROI. We have places available in April and May – see page 51 for further details.