INNOVATION IN EXECUTIVE DEVELOPMENT

A case-based study of practice in international business schools

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Ashridge

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EXECUTIVE SUMMARY

Business schools are under constant pressure to renew and refresh what they offer to executives. This is manifested in new content, new processes of delivery, and even new insights into the fundamental purpose of what executive development is for.

UNICON and Ashridge Business School co-sponsored this research project to look at the leading edge of business school evolution: the innovations in executive development occurring in business schools worldwide. The aim was to identify and share examples of innovative practice for the benefit of the executive development community, in line with UNICON’s research mission:

“To improve the practice of executive development”.

Following interviews with representatives from 20 schools, a short-list of six was drawn up for further investigation and development into detailed case studies. The examples chosen display innovation across a range of areas: products, programs, philosophies, and geographies.

Based on the case studies and other interviews, totalling input from over 80 individuals, a model of innovation in executive development is presented. The model highlights positive characteristics grouped into four areas – individual, culture, support and business partnership - which stimulate innovation. The model also represents schools’ focus & strategy, and the learning approaches through which innovation is occurring.

It is hoped that the case studies will provide valuable insights for enhancing other executive development offerings, and that the model will provoke reflection on whether schools are being run in ways that maximise the opportunities for innovation to occur.
BACKGROUND AND CONTEXT

Organizations continue to seek the support of business schools in order to develop managerial capability. However, the slice of the management market that business schools serve is undoubtedly small, with challenges from prominent researchers within the field (e.g. Mintzberg 2004, Ghoshal 2005, Pfeffer & Fong 2002, Monks 2001), doing little to repair the damage inflicted by sceptical ‘outsiders’ (Bradshaw 2007, Skapinker 2002 & 2008).

The criticism that business schools are disconnected from the reality of management practice, their research holding little relevance for managers and leaders, has served as one of the key drivers in the evolution of the executive development industry. Other important factors include the impact of global competition, changing corporate needs and higher client expectations (Cornuel 2007, Farris 2003). Farris (2003) suggests that companies are becoming more selective in terms of who attends programs, and seeking better value from their investments (Vitello, 2000, Lippert, 2001, Schneider and Hindo, 2001, Williams 2006).

If there are negatives, there are also positive indicators of an increasing demand for executive education. Lippert (2001) suggests that the growing importance placed on capability-based capital, the internet enabled economy, technology advances and diminished limitations of distance, and the growing view that education should be a process and not an event (also Kovach 2000) all signify a bright future for executive education.

Thus there are great opportunities for providers who are agile, savvy to the needs of the market, and can demonstrate their capability to add value to clients. Before reviewing in detail case studies of six business schools astute to these opportunities, we take a look at what is emerging broadly in the literature about the delivery and purpose of 21st Century executive education. We intend this to provide a context for the cases studies that follow, which are based on our primary research. We use the six categories identified by Conger (2000) as our framework for discussion:

Learning needs (1) and content (2)

Conger notes the drift from functional knowledge towards strategic leadership and organizational change, an observation confirmed by many others. In this age of ‘at your fingertips’ information where the currency value of knowledge is plummeting, the distinction between knowledge acquisition and capability development is accentuated. Business schools are staking claims to their value-add through means other than imparting scarce, valuable knowledge, e.g. consultancy, ‘know-how’ development and what Lippert (2001) describes as ‘insight’ skills – the ability to learn the right things from experience.

So, executive development is being ‘chunked’ in new ways, with functional training taken in-house (Cornuel 2007), the maturing MBA market leading to a ‘rationalisation’ of the business school industry and a proliferation of executive development offerings. The phenomenon of short, intensive, highly customized and flexibly
delivered programs (e.g. Williams 2006) is not new, but there does appear to be growing emphasis on the enduring nature of development, with learning events lasting up to several years (Lippert 2001) and development seen as an ongoing process (Kovach 2000).

Huge technological advancements in a climate of high time pressure and scrutiny of expenditure on executive education (Farris 2003) mean that e- and blended learning are also becoming attractive options (Beckman & Barry 2007), at least to fulfil part of a development need. Opting for highly specific, Just-in-time, online learning can be entirely appropriate.

With timeliness and specificity in mind, shorter interventions, shorter lead times and better assistance for companies in selecting the most appropriate development option to meet their needs are all shaping the design of programs and administration processes. The degree of engagement of the client is also key to specificity and is discussed in detail below (see organizational integrating mechanisms).

**Pedagogy (3)**

The role of experience in learning is arguably the most significant determinant of executive learning design in recent years. Of course, the arguments have been in existence for decades, even centuries, with proponents such as Dewey (1897) positing that the only ingredient for learning is experience, whilst others, notably McCall (2004) arguing that much is yet to be learned about how experience can purposefully be used for effective development.

Focusing specifically on leadership, McCall discusses how different experiences can confer different learning opportunities, people will learn differentially depending on what prior experience they bring to the learning opportunity. Because people don’t automatically learn from experience, the biggest challenge is in giving the right experiences to the people who will learn the most from them.

‘Purposeful experiences’ often take the form of action learning assignments, where this term is used to mean work-based projects requiring both real-time experience and a high degree of learner involvement. Conger (2000) argues that multiple learning sessions need to become the norm, with action learning at the core – importantly, developing the capability for learners to connect several domains of knowledge (Clark 1992). This may mean having several action learning assignments with similar learning objectives.

Action learning used in the more general sense of ‘active learning’ includes activities such as business simulations, games, role-play and improvisation (Lippert 2001, Cornuel 2007). The common theme is that participants engage actively, rather than being passive recipients of knowledge. Again, these ideas are not new, but in the move from management education (focused on theory) to management development (focused on practice) (Fox 1997), and from pedagogy to andragogy (Monks 2001), they are increasingly becoming a staple of executive learning provision in the 21st century.
Increasingly, executive development processes claim to be 'transformational', “presupposing sustained behavioral change so that an individual becomes more effective in personal or organizational change” (Kets de Vries 2007). Kets de Vries offers three conceptual frameworks for influencing the process and stimulating true transformation. His ‘mental life’, ‘conflict’ and ‘relationships’ triangles describe the changes that individuals need to make at the cognitive, attitudinal and behavioral levels. He points out that transformation is not easy, and there are major challenges in designing truly transformational programs. He summarises these as: the selection of participants, finding the focal points for personal change efforts, creating transitional space, making change last and having the right faculty (see Instruction below).

**Participant mixes (4)**

Given the trend in up-scaling from individual development to improve performance toward organization-wide interventions, it comes as no surprise that participants are learning as cohorts rather than individuals. As such, customized programs need to involve entire teams, rather than individuals (Conger 2000).

Recognition of the criticality of top-level support in embedding organizational change means that members of the senior management team are increasingly acting as sponsors of action learning projects, participating in programs, and should be volunteering for potentially risky activities if they are to have any significant impact (Brookfield 2006).

Whilst selection for executive development is often beyond the control of the individual, there is a certain irony (though no surprise) that when asked why they attended programs, executives who attended 'because of others' were the most cynical of the experience (Long 2004). This raises questions about the buy-in and participant selection processes that organizations use in commissioning and implementing development opportunities.

**Instruction (5)**

Conger (2000) notes the growing use of the ‘executive teacher’ and whilst business schools continue to use a range of external providers including consultants, trainers, and university faculty, there is increasing emphasis on the use of company executives and managers. This ties in with the closer relationship developing in an increasing number of client-provider ‘partnership’ programs.

Whether internal or external to the organization, the bar is set high for today’s executive instructors. Faculty must not only be thought leaders, but also interested in and able to interact with participants (Farris 2003). Haskins (2006) in his paper, “Making it sticky”, presents a summary of 30 tried and tested mechanisms for facilitating the transfer of executive education experiences back to the workplace. He suggests that not all ‘sticky’ mechanisms can be executed by everyone in an equally effective manner. Instructors must not only be up-to-date in their own subject matter and knowledgeable of participants’ backgrounds, but also integrative in
their approach, good listeners and able to balance pre-planned teaching agendas with emergent opportunities.

In his discussion of the challenges of designing a transformational program, Kets de Vries continues Haskins’ argument, suggesting “managing this sort of program demands the kind of knowledge, skills and attributes not typically found in a traditional executive educator...Someone working in this sort of program will dispense an enormous amount of emotional energy engaging with participants, challenging them whilst simultaneously showing empathy and care” (Kets de Vries 2007 p. 385).

Others have stressed the importance of instructors modelling the conditions in which participants operate, e.g. teaching in interdisciplinary teaching teams to model the challenges of working in cross-functional teams (Musselwhite 2006).

Once again, the ideas of the qualities an instructor should have are not new and Monks (2001) quotes from Kierkegaard on the importance of meeting the learner where they are at:

“If real success is to attend the effort to bring a person to a definite position, one must first of all take pains to find him where he is and begin there. In order to help another effectively, I must understand what he understands. If I do not know that, my greater understanding will be of no help to him” (Kierkegaard translated by Dru 1959).

**Organizational integrating mechanisms (6)**

Clients and providers are ever more intertwined in the design and delivery of executive development interventions. There must be clear benefits to working collaboratively, given the inconvenience and demands conferred on both sides. On the client side, there is a powerful argument for collaboration given the shift from developing managers as individuals to support organizational goals toward executive development as a means of changing the whole organization (Crotty 1997, Conger 2000). This comes alongside the increasing body of work on what constitutes effective development, including the importance of the organizational culture in fostering or impeding learning (Brookfield 2006).

For providers, if the competition is doing it, it becomes a competitive disadvantage *not* to be able to offer a collaborative approach. More optimistically, we can hope that business schools themselves are driven by the desire to effect maximum positive impact, and if this is through careful co-design and crafting, so be it.

Perception of where learning starts and where it stops is critical to the effectiveness of executive education. Kovach (2000) says that if management education is seen as “going on a course” then its impact is destined to be low, particularly when participants return to work and the rest of the organization is unchanged. He proposes resisting the potential demands for “more time with the experts” and shifting the focus toward on-the-job support to implement new learning. He suggests five areas for improving the effectiveness of learning
transfer: communicating its purpose, customising - on the organization’s side this means clearly articulating the outcomes sought and making a clear link to the organization’s strategy, using action learning with top management buy-in, matching the learning process with the organization’s needs and providing follow-up support.

**Summary**

So, where does innovation fit in all of this? The survivors, as in any competitive evolutionary scenario, are those best able to adapt and change to suit the prevailing environmental conditions. Innovators in the world of executive development are those who respond to the drivers and opportunities for change with creative solutions. The figure below summarises the drivers, opportunities and broad categories for response by the executive development industry. What marks out the innovators from the followers is their willingness to take risks, aware that some solutions will work whilst others will fail, so leading the evolution of the industry.

![Diagram of Industry responses to the drivers and opportunities in executive development]

Another feature of innovation that mirrors evolution is the possibility for parallel, incremental or step-change progress. Throughout the above commentary, readers will have been able to position their own schools against the industry context. Some will have been at the leading edge, others further behind. Similarly, in the case studies that follow, our aim has been to tell stories of innovation from within different contexts. As such, the extent to which the innovations appear incremental, revolutionary or potentially a repetition of existing practice, will vary, depending on the position of the observer.
**METHODOLOGY**

An e-invite for involvement in the project was sent to all representatives in the UNICON network, reaching over 85 member schools. Whilst the largest representation of UNICON members is from the US, membership is global. Criteria were supplied to enable schools to decide whether they had a suitable example of innovative teaching and learning practice to put forward. These criteria were:

- Has the innovation been developed recently?
- Is it in service of improving teaching and learning?
- Has it been independently evaluated, e.g. through client feedback or recognition from another institution?

Schools which nominated an example that met these criteria proceeded to the next stage.

The invitation to self-nominate an example of innovative teaching and learning practice was also posted on the Ashridge website and sent to other business schools and networks. The research team attended the UNICON Spring Conference in Madrid in April 2007, entitled *The Innovation Imperative*, in order to raise awareness of the project and gather relevant material.

This initial stage, based on self-selection, a non-probability sampling method, resulted in responses from 20 business schools. Each respondent was then invited to participate in a semi-structured telephone interview with a member of the research team, lasting approximately one hour. An interview template with 10 areas for discussion was sent in advance, and in some cases was returned partially completed which aided the interview process.

From the telephone interviews, a shortlist of six examples of innovative practice to develop into full case studies was drawn up by the research team in discussion with the UNICON Research Committee. A purposive sampling approach was taken in order to present a diverse range of cases that were felt to be of interest and value to a broad cross-section of business schools. Factors taken into consideration included: broad applicability, geography and nature of the innovation (e.g. was it a program, product, philosophical stance?).

Clearly there are many more innovative teaching and learning practices in executive development than this study was able to learn about given the self-selecting nature of the population, and the relatively small sample size. Further, this work does not intend to pass judgement on which are the "best" of those examples put forward. The report and cases within it are instead intended to present new ideas and provoke insights that can be developed and applied in other business school contexts in service of enhancing executive development.

The timeline featured below provides a high level overview of the project process:
Fig. 2: Project timeline
CASE STUDY SUMMARIES

1. Emergence, magic and transformation. Alchemical learning out of Africa
   UCT Graduate School of Business

2. “The Power of Experience”: the development of the ExperienceBase tool for sharing executive experiences
   UNC Kenan Flagler

3. Changing the Amcor story: developing leadership and mapping organizational change using archetypes, group dynamics and narrative analysis
   Mt Eliza, Melbourne

   Ashridge

5. “Invented here”: Integral change at the Naval Surface Warfare Center, Corona
   Notre Dame

6. An environment of innovation: the BI Norway story
   BI Norway
Emergence, magic and transformation. Alchemical learning out of Africa

Introduction

This case study introduces the Alchemical Learning Model, developed by the University of Cape Town Graduate School of Business (UCT GSB). The Model promotes learning at four levels of outcome: explicit, implicit, embedded and emergent and is based on the premise that participation is the primary mobiliser for learner engagement, meaning-making and knowledge co-creation. It is included for its innovative explanation of and foundation for program design at UCT GSB.

Overview

The concept of the Alchemical Learning Model was first articulated in 2004 and has been the subject of ongoing organic development, crafting and refinement ever since.

The Model’s creators felt that traditional learning assumes engagement is based on explicit outcomes which are designed and then taught to. In contrast, the Alchemical Learning Model is designed to address four levels of outcome which grade progressively from existing knowledge to emergent, co-created knowledge. Whilst explicit outcomes are considered important, the model predicates that learning can only reach its full potential by engaging with implicit, embedded and emergent outcomes as well.

Directly correlated with these four levels of outcome are gradations of participation. In the model participation is the primary mechanism for shifting learners along the continuum from knowledge acquisition to knowledge co-creation.

The aspiration reflected in the model, and in the work it represents, is to develop high impact, sustained learning interventions that are truly responsive to individual and group needs. It provides a response to the criticism that transmission-based learning often fails to embed learning and create transformational change back into client organizations. The model takes participation seriously, in contrast to the often unsubstantiated rhetoric of ‘participation’ that its creators believe exists in some executive development offerings.

The enactment of the model is seen in design and delivery of both customized and open executive education programs at UCT GSB.
“The Power of Experience”: the development of the ExperienceBase™ tool for sharing executive experiences

Introduction

This case describes the design and development of a software tool called ExperienceBase™, the aim of which is to facilitate and enhance the sharing of experience amongst business executives. Innovation exists not only in the end product; this case demonstrates the power of a diverse team to act synergistically, building innovation on top of innovation through the development and implementation process.

Overview

UNC Kenan-Flagler provides executive development to a diverse set of organizations, with specialist focus on business acumen and entrepreneurship/leadership.

Former Associate Dean for Executive Development, James Dean, recognised that tapping into the experience of executives held the key to their ongoing development. Following research, he developed the concept of a software tool to enhance the sharing of experience.

A prototype product was developed in collaboration with Dow Chemicals in order to support a two-week leadership high potential program. This program helped Dow and UNC understand more detailed requirements for such a tool, including the design and support needs to ensure its success within a program cohort.

In 2006 a new product called ExperienceBase™ was specified and developed by an external Web company, Terralien, in conjunction with UNC. The product was launched in early 2007 and is now in the beta phase of implementation with four groups: Microsoft Europe, UNC Alumni, recently appointed School Principals and the U.S. Navy.

ExperienceBase™ is designed for intact teams or cohorts from an Executive Development program at UNC, so that there is a strong element of trust within the group. All contributions are anonymous to encourage honesty and openness.

The ExperienceBase™ tool allows individuals to record a memorable experience in their careers along with key information on the impact of their decisions, their learning and how they would act differently in the future. The experiences may be searched in a variety of ways. In addition others may contribute to a discussion based on a particular experience, or based on an unrelated topic.

The tool is intuitive to use with a carefully thought out simple design, which has encouraged a wide variety of approaches to using it by the beta testing groups – from a coaching and support tool for those with current dilemmas in the workplace to acting as the basis for the development of an online ‘book of experiences’ of those in leadership positions.
Changing the Amcor story: developing leadership and mapping organizational change using archetypes, group dynamics and narrative analysis

Introduction

This case study describes the Amcor Strategic Leading Program. The program was selected for its innovation in combining theories and practices of individual and group transformation with software-enabled narrative analysis to support leadership development and organizational change. The program also built on research relating specifically to Australian work culture and leadership.

Overview

The Amcor Strategic Leading Program, run for the first time in 2007, used an intense group dynamics-based learning framework to create a powerful set of supportive relationships between senior leaders across a disparate organization.

At the start of the program, direct reports of the program participants created a collection of leadership archetypes representing themselves and their bosses using a structured narrative analysis technique. During the program participants also created a collection of leadership archetypes. When they had done so, participants were shown the archetypes their reports had created and they plotted both sets of archetypes – which are represented literally as cartoon characters - against existing culture maps of leadership in the Australian work culture. The plot provided a snapshot of current leadership behavior in the organization.

Participants then engaged in an intense two-module program (7 + 5 days, one month apart) that sought to provoke personal and group transformation, and facilitate skills development to enable them to take ownership for, and work on, leadership behavior and culture within their businesses.

At the end of the program, a process was established whereby each participant, his/her boss and reports two levels down continue to tell stories on a regular basis, indexing them against a number of criteria. A user-friendly software tool is used to facilitate the process and interpret the data, thus providing an efficient way of tracking changes in leadership behavior at senior levels across the organization.
“Invented here”: Integral change at the Naval Surface Warfare Center, Corona

Introduction

This case study describes a leadership and organizational development intervention for a division of the US Navy delivered in partnership with Notre-Dame. It was selected for the innovative use of Integral theory as the overarching framework to inform the methodologies and theories used to effect individual and whole system change. The case study also demonstrates the value of an engaged workforce in embedding change and taking ownership for their future development.

Overview

Notre Dame has worked with the Naval Surface Warfare Center - Corona division, since 2005 on leadership capability and organizational development. The work has involved three distinct phases:

Phase I, the Corona Leadership Academy (CLA) essentially acted as a springboard for later work. Its purpose was to cascade leadership development through the organization in a way that created a shared understanding and discourse. It touched all employees at Corona to some extent, though the emphasis was on leadership development for middle to senior managers.

Phase II, the Whole-system Executive Leadership Development (WELD) initiative, involved a range of means to promote individual and organizational development, including individual assessment and coaching, workgroup activity and expert input, culminating in a large scale event in May 2006. Three methodologies underpinned most of this work, Action, Reflection, Learning, Real-time Strategic Change and Polarities Management.

Phase III, the Employee Development Program (EDP) emerged out of the activities begun during phase II. The focus is on facilitated workgroup activity, coupled with expert input as required. The EDP continues into 2008, with workgroups rolling out the employee development systems they have designed, identifying and requesting further development as required.

The blend of consulting, executive education, coaching, action learning, strategy definition and refinement, assessment and large scale change events that has resulted is held together by an overarching appreciation for the interdependencies between these components as described by Integral theory.
An environment of innovation: the BI Norway story

Introduction

This case study describes both the underlying innovative culture of the BI Norwegian School of Management and a novel series of programs which use the thoughts and words of historical figures as a foundation for modern leadership practice. The programs are based on ‘cities’ courses run by a cross-disciplinary faculty team which take participants to specific locations such as Rome, Troy, Florence or England to understand the beliefs and thoughts of key people in history including Machiavelli, Dante and Elizabeth I, and how they relate to successful leadership in today’s business world.

Overview

BI was established in 1943 as a privately-funded educational institution, a markedly different approach to the typical Norwegian model. From its inception, its survival has been dependent on meeting the needs of the business market. This culture has driven entrepreneurship and innovation throughout BI’s history. Glenn Ruud, Director of Studies of Executive Programs, believes a ‘faculty cowboy mentality’, where faculty are given the freedom to innovate is the key to BI’s success. He sums up the conditions for innovation at BI as a belief in personal ability to innovate, being in the right place at the right time, personal relationships, coincidences and finally, structuring the solution to be a success.

Two BI Associates Steinar Bjartveit and Kjetil Eikeset, with backgrounds in psychology and philosophy, developed a concept of using classical literature and academic texts, explored in the physical ‘home’ of that text to create a strong experiential learning opportunity around leadership and management. These so-called ‘cities’ courses are founded on a strong belief that older texts, such as Machiavelli’s ‘Il Principe’ are as appropriate as those from modern-day management gurus and that fields such as conflict theory, existentialism and psychological therapy and complexity theory have much to contribute to learning leadership in today’s world.

The courses are aimed at experienced managers who are ready to explore leadership from a new perspective, with the average age of attendees being 38 years. The overall design combines three core elements - modern perspectives, classical perspectives and experiential learning/pedagogy, with the aim of moving away from the traditional executive development case study. The on-site element lasts 3-5 days out of a total of 150 hours learning. Participants experience leadership in the streets, parks, churches and buildings associated with the authors through tasks that used power, influence and political landscapes. There are additional pedagogical objectives which this on-location learning aims to achieve including improved retention, and increased interest, curiosity and motivation in the learners. “There is something about being in the real place. It brings the story alive,” says Bjartveit.
Muscle Memory: the Future Leaders Experience at the Foreign and Commonwealth Office

Introduction

This case study describes the Foreign and Commonwealth Office Leadership program for high potential civil servants. It explains the underlying research on ‘learning for the future from hindsight’ that led to a new model of learning – muscle memory, and the challenges to both the faculty and participants in undergoing an intensive self-reflective experiential program offering longer term ROI.

Overview

In 2006 Ashridge created a very different tailored executive program aimed at future leaders, based on an experiential learning model. Initially developed as an Open offering, the program was tailored specifically to meet the needs of the Foreign and Commonwealth Office (FCO) Band D managers, those immediately below the senior civil service grade. The FCO promotes British commercial interests throughout the world, and those at Band D are at a critical stage in their careers, looking to enhance and develop their high level management skills in a changing global environment.

The FCO Development Program grew out of a relatively new program known as the Future Leaders Experience (FLE) founded on research within Ashridge and an increasing need to find an effective learning mechanism for emerging senior leaders as they switched from a general management role.

The design of the program is based on exposing the participants to critical leadership-testing incidents, allowing them to develop ‘muscle memory’ so that they will be better equipped to deal with real incidents in the future. The nature of these incidents was highlighted through underlying research with over 300 leaders, most importantly investigating the answers to the question “what do you wish you had known ten years ago?”.

The four-day program includes a day-long business simulation. It is an intense learning experience involving a variety of activities aligned to the FCO Band D competence framework and the critical incidents, with a strong focus on self-awareness and the impact of the individual on others. The program is facilitated by a highly-skilled team of three faculty. Numbers are limited to eighteen participants to ensure maximum levels of personal support and coaching through the learning experience.

A recent survey of participants has shown that the learning has been embedded back in the workplace at the Foreign and Commonwealth Office, and that whilst being very challenging for the individuals, the program has been highly effective.
A MODEL OF INNOVATION IN EXECUTIVE DEVELOPMENT

The initial phase of research generated responses from 20 business schools globally. As discussions progressed, patterns began to appear which highlighted the features, conditions and pedagogical approaches inherent in innovative solutions in these schools. The model in Figure 2 below was constructed as a representation of the key elements based on these interviews.

The first four branches of the mindmap (individual, culture, support and business partnership) describe the positive **conditions** for innovation:

The final two branches – focus/strategy and learning, relate primarily to programs or courses developed by the schools, as this was the most common form of innovation we discussed. They describe the **features** or approaches to the learning that were consistent across the schools.

In combination these six elements were the ‘critical success factors’ for innovation, whether it was for a course developed by the University of Calgary back in the 1990s, a new tool developed by IMD or UNC in the last year or a recent innovative program from Melbourne, Singapore or Boston.

![Fig. 3: Innovations in Executive Development](image)

**Elements of innovation**

In order to further expand on the most common factors in these innovative environments, each of the six elements may be broken...
down into more detail. The sub-elements in the diagram are not all-encompassing, neither do all apply for any given school. However, together they paint a picture of the most important features.

**Individual**

Although many of the innovations were a team effort, invariably there was one key **individual champion**. This person owned the original idea and was instrumental in driving it through to implementation, albeit in conjunction with colleagues both in business and the business school. In general this person had wide experience of life, and was well read across a number of disciplines, both academic and personal. (S)he had a strong understanding of client needs, was a good listener and synthesizer of ideas into practical, workable solutions. (S)he was often fairly senior in the school and a strategic thinker, as well as someone who was a change driver and early adopter of new ways of working. Overall the person had a strong passion for the idea and was willing to overcome obstacles to see it realised.

**Culture**

The culture within the business school was an extremely important facilitator of the volume and quality of successful innovations. In fact, during a presentation on some of our preliminary ideas on this model to a meeting of EFMD (European Foundation for Management Development, an international network for excellence in Management Development) in October 2007 at Marseille, it was voted by the business schools present as the prime critical success factor. From our research the best innovations came from those schools which encourage **calculated risk-taking and innovation**, which value (and reward) the varied contributions of the staff and which have a **no-blame culture** of positive learning from mistakes. A school which is **forward-looking**, not resting on its laurels if already highly successful, or striving to be in a better position if not in the number one slot were common features. Equally, in today’s commercial world, the best schools encouraged the faculty to innovate **within the context of the school’s strategic direction** and business niche, to ensure a higher percentage of viable innovations. A combination of a clear direction for the school and an understanding of what would work from the individuals within the school was a formula for success.

Culture was the one factor which had the strongest negative flipside. If the school did not encourage and reward experimentation and innovation, if it did not continue to hire and develop faculty with new ideas, and if the focus was on short-term return on investment, then it was likely to suppress innovation.

**Support**

Allied to the culture, and inherent in the practicalities of implementing large innovative solutions in a school, is the support that is given to the owner of the innovation. This support manifested itself in two main areas – the **wider environment** and the **specific innovation team**. Support from the school was in the form of senior advocates who would champion innovations both inside and outside the school,
and not pressurise the developers too much. It was also from colleagues who would volunteer to participate in and act as advocates of the innovative program, even if they had not been involved in its creation. Support from business clients came not only in providing knowledge and experience, but also a long-term view on return on investment for employees involved in a new and still-developing program. They also ensured that the learning was embedded in the organization. On a more day-to-day level, success was through a strong implementing team from business partners through administrative staff to those people who worked on the development, implementation and marketing of the innovation. In addition to their work, this group played the vital role of a check and balance to the innovator, providing constructive criticism, suggestions for improvement and overall questioning of direction in order to add value to the original concept. The most successful innovations were therefore true team efforts, and usually a reflection on the ethos and culture of the school itself.

**Business partnership**

Most innovations in this area appeared when there was a partnership between the school and one or more selected clients. The development of new executive programs in particular, requires a true partnership – neither party has all the knowledge, abilities or skills to go forward alone. When combined in the best possible format for the particular innovation, the **two parties can act synergistically** and develop a solution that has real practical application in the workplace as well as a strong educational underpinning. It was important that both parties acted as partners, not as vendor and client, and were flexible in their approach. In our interviews we discovered that to improve communication and the working relationship it was desirable that the school faculty had real business experience, although it was not essential. **Trust** in each other was critical and a demonstration that the partners from the school understood real business issues supported that trusting relationship. There were many different ways in which the business clients contributed to different solutions – from design, to coaching, to teaching, to being a knowledge source, but ultimately the value lay in ensuring that the learning was embedded in the culture of the organisation on an ongoing basis.

It was a conscious effort by most schools to develop and test innovations with those business clients with whom there was a long-standing and trusting relationship, one that would weather any teething problems and which could stay focused on the final objectives.

**Focus/strategy**

Most of the innovations we discussed with interviewees resulted in new programs. In these cases, there were two clusters of common characteristics of these programs. The first was the focus or strategy of the innovative solution. It was usually **holistic**, looking across business functional boundaries and **global**, reflecting operations in today’s business world. The majority of the solutions were **tailored** or customized to specific clients to ensure maximum impact of the learning, and were taught in a way, contained content and involved
activities which were highly applicable to the real world in which the participants worked. Not surprisingly ‘leadership’ came out as the most common subject area for these innovations. However leadership was defined, the solutions all involved the human and emotional side of working and sought to change behaviors of the participants over time; they were not ‘quick fix’ solutions. Most involved some form of ongoing coaching or discussion beyond the classroom.

**Learning**

The learning design was also common in its approach. It was usually ‘blended’ in the best sense, involving a variety of different elements often including action learning or experiential elements along with high levels of discussion and debate. In many cases there was also an element of virtual learning involving simulations and online discussions or support. All programs had components that were fairly high energy and intense for the participants. Didactic teaching was not high on the agenda! Given that the focus was usually on people and behavior, the designs encouraged analysis, critical review and reflection. A variety of approaches were used such as storytelling, narrative capture, or the use of analogies or links for sense-making. The aim was usually for transformational learning. The innovative programs took a cross-disciplinary approach in terms of subject matter and faculty used.

**Barriers to innovation**

Although we interviewed people who had developed successful innovations, as a group they had wide past experience and were therefore able to articulate the barriers to innovation. In most cases they were the converse of the detailed points on the mindmap above. Consistently the most critical barrier was that concerning risk – both culturally and financially. A school which has a strong financially-driven model, which looks for short-term payback on new ideas, and whose focus was more on incremental development of past products is not innovative. Faculty also felt stifled by a culture which discouraged experimentation, which was bound by regulations and standards, and which often exhibited traits of a ‘blame culture’ when the first iteration of a new idea was not an immediate success.

Some interviewees felt that the focus on a research culture and on academic qualifications restricted innovation in the Executive Development world of today, and that the Executive Development group, particularly when located within a larger university environment, required a different, more flexible operating model.

On an individual and school level there was recognition that other innovative ‘failures’ were in fact a mismatch between the idea and the perceived needs of the audience or the strategic direction of the school. Innovations in these cases were not necessarily bad, but may have been ahead of their time, a poor fit with the client HR purchasing requirements, poorly marketed, a struggle for the participants to grasp or just outside of the scope of the school’s image and capabilities.
In general in successful schools other potential barriers actually acted as **stimuli** for innovation, and were not seen as barriers at all. They included the changing nature of the learning experience (just-in-time, less time away from the office, personalised learning) and new sources of competition and knowledge (consultancies, social networks).

Overall, there was a fine balance between managing an Executive Development business school department in today’s pressurized environment, and having a strong focus on the future by encouraging the right conditions and people to innovate. From a point of view of the school, the keys to success seem to be the **cultural environment** and the **relationships and teamwork** amongst all those involved in innovations.

There is no simple formula to create an innovative business school. Although there are common features, each school has its own approach and priorities. Each of the six case studies reviewed in depth provides its own slant on the important conditions surrounding innovation. Based on our knowledge of the schools and their innovations, we have produced a subjective analysis of the relative priorities of the six factors in the mindmap, represented below by numbered clouds.
**UCT Graduate School of Business**

*Alchemical learning – process-driven philosophy underpinning program design*

The culture in the Executive Development part of the University of Cape Town Graduate School of Business is one of sharing, supporting, playing with and testing out new ideas. Faculty sit in on one another’s programmes to learn and to provide feedback and there is a high influx of fresh ideas from the many Associates who co-design and deliver programmes. The school’s approach to learning (as characterised by the Alchemical learning model) is interwoven through program design and the focus of executive development is very much on co-creation rather than knowledge acquisition.

**UNC Kenan Flagler**

*ExperienceBase - software tool to facilitate executive experience sharing*
The most important driver in this example was Jim Dean, the individual who came up with the idea and owned it throughout – it was his baby. He had a strong development team including an external web development group. The culture of UNC was supportive of such innovative practices, and provided the underlying environment for innovation, but given the team of people involved it was less influential than the other two factors.

**Mt Eliza, Melbourne**

*Transformational leadership programme supported by culture mapping and on-line narrative capture*

The Amcor Strategic Leading Program was only able to develop in the way it did because of the strong partnership between Phill Boas of Mt Eliza, John Evans of Cultural Imprint and Glenda Hutchinson of Amcor. The intensity of the program’s design meant that these three had to trust one another fully – reflecting the atmosphere they aimed to establish in the participant group. Glenda’s role was critical in gaining access and endorsement for the program from the CEO and executive board.
Notre Dame

Leadership and organisational development based on Integral theory and whole workforce engagement

Notre Dame and NSWC Corona Division developed their partnership over several years. In the early stages Notre Dame worked in a fairly conventional supplier role, transitioning to co-developing an OD process with Corona. Ultimately Notre Dame will move into a Consultant role with Corona employees leading their own development agenda. There was a strong internal champion at Corona who drove the project forward. The focus is on engaging the whole workforce and integrating learning and development into the organisational culture, systems and processes.

Fig. 7: Notre Dame components
Ashridge

**Future Leaders Experience** - program based on simulated critical incidents to develop muscle memory

Again there was a strong individual Ashridge's Eve Poole, who had a vision for the future, but the most important element was the internal Ashridge culture which is one of working with clients to try new and different approaches to learning. The strong business partnership with the Foreign and Commonwealth Office in the development, implementation and cultural change was a close second. Although all other elements played a part in the innovation, these two were undoubtedly the most influential. If a third place needs to be assigned, it is probably 'individual' although the strong learning design incorporating extensive experiential learning is a close fourth.

**BI Norway**

*Using historical philosophies to inform current business practice*

Fig. 8: Ashridge components

Fig. 9: BI components
For BI, undoubtedly it is the culture of innovation and encouragement of all staff, not just faculty, to be innovative that is the main influence. Steinar Bjartveit and his colleague had a strong belief in the validity and effectiveness of their ideas. The ‘learning’ branch is highly important here; the main focus of the team was on a new and different learning design.

**Analysis**

Although the classification of key components and priorities in the six case studies is subjective, it is worth noting that **culture** comes out as the most popular (three scores of top priority and one third place), followed by the **individual** driving the innovation and by **learning**. All three of these branches were listed four times in the priority list. At a more detailed level the following items were strongest, and even though the result is not in the least scientific, it does paint a picture of the innovative environment in Executive Development:

- The school knows and communicates its **strengths/niche** and innovators work within that. The strong support of **colleagues and associates** to participate in and take **risks** with new ideas is critical. An environment of **trust** between the school and key business players or other suppliers is vital, and that whatever is developed, the ownership and success is acknowledged to belong **both to the business and the school**. The learning is **tailored or customized** to the participants and is seen as a **longer term** personal development, not a quick course. The strongest elements of the learning are **reflection** and the **facilitation** of learning, rather than teaching, by the staff.
CONCLUSION

In the course of this research more than 80 people discussed their beliefs in and approaches to innovation in executive development. It soon became clear that innovation is highly contextual. It may be a major revolutionary change, or a small evolutionary step. What is seen as revolutionary to one may be evolutionary in the eyes of others, depending on the environment in which they find themselves. It may result in new philosophies, learning approaches, programs or products.

Six case studies were chosen, as a representative sample of the variation in context and approach to innovation. Cape Town developed a philosophy of learning called the Alchemical Learning Model and applied it to the design of the school’s programs. UNC developed a tool and process for recording and sharing critical executive career experiences. Mt. Eliza made use of narrative analysis and leadership archetypes to support leadership development and organizational change. Ashridge adopted a strong experiential learning philosophy to instil muscle memory in emerging leaders. Notre Dame made use of integral theory to drive change across the Naval Surface Warfare Center, Corona Division. BI demonstrated a strong school culture of innovation and developed a program with a very different historical perspective on expert sources of leadership success.

However different, there are some common themes emerging. The innovators are moving away from didactic teaching of siloed subject areas and focusing on the behavior and impact of the individual leader. All schools aim to achieve maximum impact for the restricted time they have available, but also, in tighter partnerships with business, are focusing on long term personal development of the individual.

Innovators in executive development are not only responding to the drivers from the external environment but are themselves driving change forward. The interviews and case studies consistently show that innovation occurs when there is a group of creative individuals with a belief in a new idea, the persistence to follow it through and support from a wider team. They have an understanding of what works within their context and draw in sound business knowledge to ensure the solution is relevant and applicable to the learners in their business roles. In the ‘best’ schools there is a culture and environment which encourages and supports innovation, with a long term view on its benefits.

Ultimately innovation in executive development is driven forward by passionate people who believe they can add value to their school’s offerings.
References


APPENDIX A: LIST OF CONTRIBUTORS

Our thanks go to all those who took part in this study. Your help and involvement has been invaluable. We hope we’ve recorded everyone’s name below, and apologise to anyone whose name we’ve omitted.

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APPENDIX B: FULL CASE STUDIES

1. Emergence, magic and transformation. Alchemical learning out of Africa
   *University of Cape Town Graduate School of Business*

2. “The Power of Experience”: the development of the ExperienceBase tool for sharing executive experiences
   *UNC Kenan Flagler*

3. Changing the Amcor story: developing leadership and mapping organizational change using archetypes, group dynamics and narrative analysis
   *Mt Eliza, Melbourne*

   *Ashridge*

5. “Invented here”: Integral change at the Naval Surface Warfare Center, Corona
   *Notre Dame*

6. An environment of innovation: the BI Norway story
   *BI Norway*
Emergence, magic and transformation. Alchemical learning out of Africa

“At the heart of it is a very simple practice. You’re a human being who matters. We create the space for you to have the opportunity to experience that what you think, what you feel and the impact you have really matter.” (Liz de Wet, Program Director)

Introduction

This case study introduces the Alchemical Learning Model, developed by the University of Cape Town Graduate School of Business (UCT GSB). The Model promotes learning at four levels of outcome: explicit, implicit, embedded and emergent and is based on the premise that participation is the primary mobiliser for learner engagement, meaning-making and knowledge co-creation. It is included for its innovative explanation of and foundation for program design at UCT GSB.

Overview

The concept of the Alchemical Learning Model was first articulated in 2004 and has been the subject of ongoing organic development, crafting and refinement ever since.

The Model’s creators felt that traditional learning assumes engagement is based on explicit outcomes which are designed and then taught to. In contrast, the Alchemical Learning Model is designed to address four levels of outcome which grade progressively from existing knowledge to emergent, co-created knowledge. Whilst explicit outcomes are considered important, the model predicates that learning can only reach its full potential by engaging with implicit, embedded and emergent outcomes as well.

Directly correlated with these four levels of outcome are gradations of participation. In the model participation is the primary mechanism for shifting learners along the continuum from knowledge acquisition to knowledge co-creation.

The aspiration reflected in the model, and in the work it represents, is to develop high impact, sustained learning interventions that are truly responsive to individual and group needs. It provides a response to the criticism that transmission-based learning often fails to embed learning and create transformational change back into client organizations. The model takes participation seriously, in contrast to the often unsubstantiated rhetoric of ‘participation’ that its creators believe exists in some executive development offerings.
The enactment of the model is seen in design and delivery of both customized and open executive education programs at UCT GSB.

**Description of the model**

The creators of the Alchemical Learning Model suggest that traditional learning assumes that engagement is based on **explicit outcomes** which are designed and then taught to. In contrast, the Alchemical Learning Model is designed to address **four levels of outcome** which grade progressively from **existing knowledge** to emergent, **co-created knowledge**. Whilst **explicit outcomes** are considered important, the model predicates that learning can only reach its full potential by engaging with **implicit**, **embedded** and **emergent** outcomes as well.

Directly correlated with these four levels of outcome are **gradations of participation**. In the model **participation** is the primary mechanism for shifting learners along the continuum from knowledge acquisition to knowledge co-creation.

**Fig. 10: The Alchemical Learning Model**

**The four levels of outcome**

The first level is that of **explicit outcomes**. These are the tangible skills, insights and bodies of knowledge that, typically, an organization has defined as the desired outputs of a program. They
are crucial, and ultimately, the success of the learning intervention will be determined by the extent to which these outputs are realised.

However, the model argues that explicit outcomes cannot be effectively achieved only by focusing at this level. Instead, explicit outcomes will be largely reached by paying attention to, and engaging with the deeper levels of implicit, embedded and emergent outcomes.

**Implicit outcomes** are the skills, insights and mastery of processes that are necessary to effectively engage with explicit outcomes but are not the tangible focus of a learning activity. For example, if the explicit focus is identifying key trends driving change within a particular industry, the implicit outcomes are the ability to source, extract, evaluate and synthesize relevant information in order to arrive at the identification of key drivers. Or, if the explicit outcome is to develop skills in scenario-building, implicit outcomes include effective time management and use of group dynamics to complete the task. In learning interventions at the UCT GSB, implicit outcomes are identified from within the explicit outputs and the learning process is designed to develop competency in these.

Whilst both explicit and implicit outcomes are important, it is the **embedded outcomes** that provide greatest leverage in the Alchemical Learning Model. Embedded outcomes relate to the intricate design of a learning experience so that it invokes and engages content through process, through lived experience. Intra- and interpersonal dynamics are addressed through reflective processes, and participants are intentionally taken out of their comfort zone, creating dissonance which enables learning to take place. The model argues that if a learning process is well constructed, with carefully considered embedded outcomes in mind, this becomes the means by which explicit and implicit outcomes are realised, and from which emergent outcomes follow.

**Cameo 1: Embedded outcomes in the Maths ‘second chance’ course**
Professor Chris Breen runs an introductory course for executives with an ingrained fear of mathematics stemming from their childhood. In one of the first activities participants share what they are feeling and experiencing and articulate what they bring to the process. Following this self-exposure, Chris uses role-play to recreate classroom experiences – the tyrannical teacher, naming and shaming of poor performers, marking of question papers – a traumatic episode which takes participants straight back into their schooling days. By creating a safe learning container, Chris enables participants to talk about it and surface their emotional, historical and unconscious attitudes. The aim is to enable participants to identify their personal strengths and abilities – the learning is in the process, and not in necessarily finding an answer. Conversely, the seeking of one monolithic answer is discouraged. The ethos underpinning this approach lies in the fact that if the delegates ‘know the answer’, there has been no possibility for learning.
Emergent outcomes are unanticipated outcomes which surface within the individual, collective and organization in response to a learning experience. Unpredictability is inherent, which needs to be nurtured and captured because this is where learning becomes dynamic and transformative. Elaine Rumboll, Director of Executive Education at UCT GSB, argues that this is where the alchemy of the learning process resides: “Alchemy spills out into the organization and catalyses unexpected results”. When working with emergent outcomes, no two experiences are the same, even if an identical process is used. “The way individuals interrelate with each other and with the experience in a particular situation creates a unique collective dynamic”.

The origins of Alchemy

‘Alchemy’ derives from the old French alkemie and the Arabic al-kimia which translates as “the art of transformation”. Thus Alchemical Learning is Transformative Learning.

Cameo 2: Transformation in the financial services sector

A program with the explicit outcomes of achieving understanding of transformation strategies, legislation and BEE (Black Economic Empowerment) in the financial services sector resulted in an entirely unscripted emergent outcome: the establishment of a Black Insurance Professionals body. The participant group was very diverse, and program facilitator, Liz de Wet, describes how “huge tensions in the group started to surface. [There was] a lot of pain and difficulty...it was palpable”. At that point, Liz had to decide how to proceed. She chose to use a reflective process of teaching circles, “It was profound and deeply moving. Most of the group was in tears listening to one another’s experiences – mostly from cross-race lines”. Liz’s choice of process (embedded outcome) aspired to model what the group ultimately wanted to achieve: respect, equality and constructive engagement. Less skilful facilitation may well have resulted in an impasse between the diverse participant groups inhibiting the learning process.

In summary, the Alchemical Learning Model is premised on the need to design learning interventions with these multiple levels of outcome in mind, although it is not reliant on a linear process of learning. The end result is not expected to be the same for everyone, there are multiple entry and exit points and different levels of immersion into the model. It is also grounded in the understanding that the process needs to engage both the individual and collective in the experience.

Elaine explains that “if you’ve got very particular outcomes, there’s a real danger of forcing a process and the learning won’t happen like you want it to. The whole point of any of this is [to address] the biggest challenge facing executive development: how do you embed learning so that it creates sustainable, observable change? If you feel it on your body, the chances are that the transformation will be longer than just the time you spend there, because it’s not just memory.”
The role of participation in the Alchemical Learning Model

At the level of explicit outcomes, learners acquire knowledge through engaging with material presented formally, e.g., articles, slides, case studies. To support this knowledge acquisition, they participate by doing tasks (implicit outcomes) that allow knowledge production. At the level of the embedded outcome, knowledge is created through engagement in the process, whilst at the level of the emergent outcome knowledge is co-created with and between learners. As Mintzberg argues, “the [learning] solution depends on the people, not just the pedagogy” (2004). The view of faculty at UCT GSB, which resonates with the ideology of much executive development today, is that the combination of appropriate pedagogies with real world experiences provides the best chance of ensuring learning delivers impact back in the workplace.

The authors of the Alchemical Learning Model argue that co-creation impacts on learners’ desire to acquire knowledge, which may change the explicit outcomes sought. For example, in an organizational intervention focusing on developing financial acumen, the learning process may expose a need for employees to gain access to information for financial reporting as a prerequisite to any improvement. Here the knowledge which has emerged through co-creation (i.e. lack of access to financial information) changes the explicit outcome from need to develop financial acumen to need to create systems to improve availability of information.

In organizations, knowledge is tacitly constructed through practice. A key value of a learning intervention lies in its capacity to replicate this experience in ways that make the knowledge creation process explicit. As such, in the Alchemical Learning Model it is important that participants are aware, to some degree, of the processes being used so that they are empowered to consciously develop, articulate, test and adapt relevant knowledge in the workplace.

Putting the Alchemical Learning Model into practice

A number of practices are in place to support effective use of the Alchemical Learning Model. These are not unique to UCT GSB, but they are consciously selected to fit within the framework of the model. These include:

- **Dual-facilitation** – content specialists working alongside a process specialist whose role it is to provide continuity, ensure that learning between participants is captured and leveraged, and notice and respond to emergent outcomes as they arise.

- **Work-based assignments** – programs often culminate in, or have as an inter-modular exercise, projects addressing real issues in the client organization. These have high-level visibility and endorsement and relate to both explicit and emergent program outcomes.

- **Learning support** – e-learning platforms, discussion forums and dedicated Learning Support Managers (LSMs). Elaine explains that, “a lot of people haven’t been in a classroom for
10-15 years, so it’s about managing the anxiety that that brings”. The LSMs are there to support ‘learning readiness’ before a program and help participants embed their learning during and after a program.

- **Co-creation of design** – for customized programs, primarily this is with the organizational client. However, in the new Nomadic Marketing program, Program Director Dave Duarte develops the program with participants. Delegates are invited to express their expectations and business needs at the outset of the program. Invited faculty use the opportunity to not only share their understanding of the subject, but enhance it by harnessing the potential of the delegate to co-create the learning. This develops the opportunity to customise the learning in the moment by drawing on the expertise and expectation of the learner. The transformational part of this learning process is effected by a change in both the attitude of the learner to the new knowledge that is being explored and the sense of achievement by both faculty and delegates at having constructed a new edge to their learning. In other programs, the delegates “set the pace and outcomes”, explains Program Director Elspeth Donovan.

**Theoretical perspectives**

A number of principles about learning and personal transformation underpin the Alchemical Learning Model:

**Complexity science, ecological thinking** and **enactivism** – these schools of thinking imply that learning and behavior come out of actions, and the assumptions and beliefs that underpin our actions are hidden at a deep level: essentially, individuals are products of their life experience. Elaine Rumboll emphasises that the starting point for any intervention must recognise that “delegates do not come in as blank slates, that they learn differently, that individuals grapple with learning at different points of entry and exist, and that content is best supported by process. We put emphasis on the rigour of the process so that delegates have the freedom and fluidity to investigate particular and individual ways of engaging with learning”.

**Magolda and Kant on knowledge** - the idea of knowledge building in the Alchemical Learning model is informed by Marcia Baxter Magolda’s (1999) *epistemological continuum* which progresses from the perception of knowledge as absolute to knowledge as contextually constructed. 18th century philosopher, Immanuel Kant (1781), described knowledge as emerging in two distinct formations: *acquisition* and *production*. In the Alchemical learning model, explicit outcomes approximate Kant’s ‘acquisition’ whilst implicit outcomes relate to his ‘productivity’. Both are important stages on route to the emergent outcomes that characterise knowledge co-creation.

**Cognitive dissonance** – this describes the uncomfortable tension that arises from having conflicting thoughts, engaging in behavior that conflicts with one’s personal beliefs and/or experiencing seemingly contradictory phenomena. The theory is that dissonance is
the key to creating new insights and challenging assumptions, leading to the development of new beliefs. First articulated by Leon Festinger (1957), cognitive dissonance is a core component of program design at UCT GSB at the level of implicit and embedded outcomes, and often leads to emergent outcomes.

Facilitators must be highly skilled in order to create conditions of dissonance AND manage the unanticipated reactions that emerge so that the tension and discomfort experienced by participants is usefully channelled.

Program director, Liz de Wet, “The facilitator has to ‘perturb’, to focus on the actions and work with what comes up. S/he must be present and mindful. I do something to create dissonance, which creates discomfort, always…I have a particular style in terms of learning engagement. It’s quite gentle, I ease people in. I take people through it, allow the dissonance and then start to reflect on it. The critical thing is always to engage the experience and then reflect”.

Holographic principle – “We engage with the client in the same way that we engage with participants”, Elaine Rumboll. The practice modelled by program directors and facilitators is to work with one another, with participants and with clients with the same level of integrity, “representing the whole at every level of engagement”. This idea is to promote the creation of “alchemical partnerships” where people create something new together. In practice this means:

1. Being part of the group whilst facilitating sessions, demonstrating and reflecting embedded processes in behavior and way of being “Liz guided us through the whole piece. She was part of the group, not seeing the group from the outside”, Schalk Shultz, participant on Strategic Leading program.

2. Coupling with other facilitators to leverage different styles and expertise.

3. Partnering with clients who are prepared to engage in intensive co-creation.

Challenges and constraints

Shifting expectations “A lot of executives...come into processes genuinely believing that they are going to be sitting down, in a classroom, and they are an empty receptacle that’s going to be filled with knowledge of the expert...who tells them what...they need to do to make them successful. So, probably the biggest challenge at the beginning of a process is to shift those expectations”, Elaine Rumboll.

Other facilitators indicated this challenge derives from the South African education system and a culture that connects authority with power and knowledge: “One of our real stumbling blocks has been a very poor education system, so high potentials and people in high positions often lack...skills that would be taken for granted in...the developed world. You have to find a way of getting people engaged with learning that’s not transmission-based...People have basically
been told, ‘what I say is correct, don’t think!’ We have to undo all of that. People have often not been asked their opinion, so they need to feel it’s a safe place. We have to ensure they understand ‘It’s ok to express your opinion, we actually want to hear what you have to say’”. Elspeth Donovan, Program Director.

Managing expectations is also key during engagement with the client organization during the design process, and impacts on resource requirements (see below) – the client does not always initially place value on the importance of getting the relationship right, and this takes time and energy to shift.

**Resources**– Working with such attention to design is highly resource intensive. Resources are required before the program starts, both in what is often a lengthy and intense co-creation process with the organizational client(s) and in terms of the induction of individual participants onto programs.

Further, it is not always easy to find program directors and facilitators with the capacity to work in a way that fits the UCT GSB philosophy and culture: “the biggest challenge is finding people who are open to this kind of learning to run processes in this way”, Liz de Wet, Program Director. And by virtue of the nature of emergent outcomes, there is always a level of unpredictability: “The emergent part is that you never actually know what’s going to happen”, Elspeth Donovan. “...So I guess it ties into that you need people who are bloody experienced. We’ve never had a disaster!”, Elaine Rumboll.

Resulting from the ambiguity inherent in the process and the need to manage client expectations, a particular challenge arises when clients have a high need for clarity and detail. Program Directors invest greatly in building trust so that clients are reassured by understanding the principles of the design, and appreciate that it’s not possible to predict exactly what will happen. “In our customized offerings we really do go all out with the client to co-design and it’s really hard...You want to say ‘trust the process’ but they want to see it....It requires quite a lot of patience, but I think once a program runs, they trust you”, Elspeth Donovan

**Key success factors**

**Resource scarcity** – it appears that pressure on resources contributes to the culture of the University of Cape Town Graduate School of Business in trying new things and working in different ways. This can lead to creativity and innovation, which may not have been the case if the school were swamped in resources. “Shortness of resources is an incredible driver of connectivity and creativity”, Jon Foster-Pedley, Program Director. “My impression is that there’s a much greater openness, or desire, or necessity to take what’s there and see how to use it... conversations, stories, ideas, anecdotes, or just raw emotional experiences”, Rob Poynton, visiting Faculty.

**Diversity and tolerance** – applies both to program directors and to participants. There is a strong ethos at the school of encouraging diversity and promoting tolerance, possibly in part a reaction to the South African historical and cultural context. The belief is that
diversity increases the potential for learning, as Elaine Rumboll and Liz de Wet explain, “A greater balance of diversity leads to richer learning...Diversity in race, gender, country, language, socioeconomic, political backgrounds, organizations...[There is] wonderful bravery in the room”.

Diversity in terms of bringing facilitators with complementary skills and expertise to work together is fundamental to program design: “[We] draw from different backgrounds – theatre, radical philosophy, mathematics – to drive a different understanding of the way people engage with and embed learning. Faculty from different departments work together – subject experts with people who understand process well – that’s where the alchemy happens”, Elaine Rumboll.

**Staffing model** - UCT GSB has an unusual set-up in that the executive development branch of business is largely staffed by Associates. In fact, between 65 and 95% of program directors and facilitators are non-core faculty. Executive Education, as Elaine says, has “carte blanche to use anybody that we want to in the world”. There is a strong focus on “pracademics” - “academic practitioners” over pure academics. Program Director Elspeth Donovan says, “We look for people not just with expertise, but people with heart”.

This staffing model provides great flexibility to bring in individuals with specific content and process expertise whose approach fits with the philosophy that the Alchemical Learning Model represents. It also provides for flow of new ideas and energy into the business school.

**Co-creation** – for company-specific programs, co-design with the client is considered critical in getting the best design for participants, “we seriously co-create” says Elaine Rumboll, “The closer the relationship...the greater the opportunity for a responsive design. And the more interest from the client in the responsiveness of the learning, the greater the possibility in developing the model of learning. The processes that work best are where we’ve co-created the learning.” The endorsement and commitment of key people in the client organization is also important so that the work-based assignments are well-integrated, and that learning is effectively transferred back into the organization.

**Dissonance** – the intentional creation of cognitive dissonance amongst participants is a keystone to unlocking learning at the deepest level of outcome in the Alchemical Learning Model. Skilled facilitation is essential to ensure that participants are pushed out of their comfort zone, but not too far, and they “feel it on their body” as Elaine describes it, and “get to a place where they start to trust the process and they trust you”.

**Evidence of impact**

Individual programs follow a variety of evaluation processes, from standard end-of-program evaluation sheets, to post-program follow-up, and, for company-specific programs, ongoing evaluation, review and redesign with the client.
Program director Liz de Wet is currently developing very specific, qualitative evaluation forms that are an extension of the learning process, designed to help embed learning between modules as well as at the end of a program. Their administration will be done by the Learning Support Manager, and Liz recognises that it’s a labour intensive process, but hopes that it will be worth the effort in terms of impact on learning transfer back into the workplace.

A high proportion of repeat business currently at a rate of 95%, and the number of long-term client relationships also provide evidence that UCT GSB is doing something right in the eyes of clients.

Feedback for this case study was sought from a handful of participants on past programs at UCT GSB. Albeit anecdotal, the key themes emerging in terms of impact on individuals cluster around: overall program design and cohesion, quality of facilitation, interactive style, importance of diversity and focus on understanding and development of self.

**Into the future**

Elaine Rumboll and Liz de Wet, the two key individuals in articulating the Alchemical Learning Model, see a couple of avenues for further development of the model and the practice it reflects.

The first is to embrace *grounded theory* in program design, to a greater extent than is currently the case. Elaine is currently experimenting with this, working with a client where both fixed and fluid elements are used in the design.

Secondly, Liz foresees a long-term, rigorous leadership program based on the Alchemical Learning Model focusing entirely on personal development. “I would imagine the leverage and learning would be 10-fold what we get now”.

Beyond these specifics, it seems inevitable that UCT GSB will remain a melting pot of ideas. The combination of environmental drivers and the culture of the school suggest that staying still is not an option. As Program Director Jon Foster-Pedley puts it, “I see it as mushroom farming...When we come up with a model, presumably it’s a very good interpretation, but we move on, we have other stuff going on at the same time. We need to keep coming up with concepts...In this environment [reference to social issues, HIV, poverty] there’s continual interpretation, continual experimentation. The context here demands a lot of innovation”.

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Key reference


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“The Power of Experience”: the development of the ExperienceBase™ tool for sharing executive experiences

“Storytelling and experience-sharing are profound ways of learning forever.”
Jim Dean, ExperienceBase™ creator, UNC

With thanks to Jim Dean, Barb Perkins, Tina Narron, Katie Naftel, Hank Robertson, Chris Hitch, Melissa Hlavac and Melissa Adams of the University North Carolina at Chapel Hill’s Kenan-Flagler Business School; Nathaniel Talbott of Terralien Inc.; Donald Hampton, Lisa Reynolds, Martinette Horner and Alisa McLean of the SSNP (Survival School – New Principals) Program.

Introduction

This case study describes the design and development of a software tool called ExperienceBase™, the aim of which is to facilitate and enhance the sharing of experience amongst business executives. Innovation exists not only in the end product; this case demonstrates the power of a diverse team to act synergistically, building innovation on top of innovation through the development and implementation process.

Overview

UNC Kenan-Flagler provides executive development to a diverse set of organizations, with specialist focus on leadership, strategy and business acumen.

Former Associate Dean for Executive Development, now Senior Associate Dean of Academic Affairs, James W. Dean Jr., recognised tapping into the experience of executives held the key to their ongoing development. Following research, he developed the concept of a software tool to enhance the sharing of experience.

A prototype product was developed and then piloted in collaboration with Dow Chemicals in order to support a two-week leadership high potential program. This program helped Dow and UNC understand more detailed requirements for such a tool, including the design and support needs to ensure its success within a program cohort.

In 2006 a new product called ExperienceBase™ was specified and developed by an external Web company, Terralien, in conjunction with the UNC team. The product was launched in early 2007 and is now in the beta phase of implementation with four groups: Microsoft Europe, UNC alumni, recently appointed School Principals and the U.S. Navy.
Product origin and rationale

In 2003 Jim Dean was having a conversation with the manager at Boeing’s Learning Development Center in St. Louis who ‘misquoted’ research from Morgan McCall (1988), which said that 80% of executive development comes from experience, not from the classroom. This idea struck a chord with Jim, as the person responsible for Executive Development, and set him on the track of thinking of better ways to ‘leverage the power of experience’ (now the executive development slogan).

Four years later, a product has been developed to meet this need. Its sources of inspiration were Jim’s examination of educational literature and research through client interviews, combined with the mental agility of Jim and his colleagues to link diverse concepts and apply them to reach a solution.

Interviews with clients highlighted issues of talent management, and the enormous effort of developing high-flyers into senior executives, whilst from a corporate viewpoint, losing much of the learning along the way when learning was not passed on to the ‘next generation’. Looking at themselves as individuals, the clients stressed the pressure to focus on day-to-day issues in today’s fast-paced world, and the result was a lack of time for reflection and discussion. They often explained that there was an element of social pressure by both colleagues and superiors to be seen as ‘working’, which acted against reflective learning.

John Dewey’s (1897) experiential learning model acted as a springboard for developing a part of the overall ‘leveraging the power of experience’ philosophy. The model along with the concept of ‘phenomenal learning’ from Olson and Ceisel (2006) helped to formulate a model, called ASPIRE©, which serves as a compliment to ExperienceBase™ and the basis for learning design.

However, the business and academic worlds were not the only sources of inspiration. Everything from a fashion article in The Washington Post to numerous discussions on topics unrelated to learning, combined in Jim Dean’s mind to produce the concept of ExperienceBase™ embedded in Executive Development communities.

“I realised it was all part of social networking in the 21st century. We are just down one branch of it, working with education, an extension of MySpace and FaceBook but for the mature executive business world.”

Jim admits the development of the ExperienceBase™ concept did not follow a traditional path. “Initially we created a tool, and then wrote a white paper on the thinking behind it. We went from a tool, to a strategy – experience - that went behind it.”

The product was developed through 2006 and early 2007 and will move on from its current beta release to more widespread usage in 2008.
Theoretical perspectives and key methodologies

“I believe finally, that education must be conceived as a continuing reconstruction of experience; that the process and the goal of education are one and the same thing.”

John Dewey (1897)

Influences

Experiential learning has roots in the work of John Dewey (1897), and has been built upon by many influential educationalists including Kurt Lewin (1951) and David Kolb (1984). Dewey’s theory of experience was founded on two interacting principles - continuity and interaction. Continuity describes how each individual experience will have an influence on that person’s future while interaction sets the experience in a situational context, the interaction between past experience and the current situation. Dewey saw an idea as “the memory of an experience”, which needed to be developed and used as the basis for action, then reflected upon to see if the action had a positive impact and was valuable.

McCall, Lombardo and Morrison were the first to emphasise the importance of experiential learning in the Executive Development world in their 1988 book “The Lessons of Experience: How Successful Executives Develop on the Job”. The authors interviewed 191 executives from whom they gleaned key developmental events in their lives and the lessons that could be learned from them. They concluded that:

“..stretch assignments and daily interaction with others are far more important to the development of successful executives than the formal training they received,” and that ultimately the responsibility for executive development rests with the line manager.

Recently Olson & Ceisel (2006) of Accenture described the term ‘phenomenal learning’ to demonstrate the transformation of learning in that organization. The phrase was coined by an HR executive on review of the learning approach at Accenture following the global economic downturn in the early 21st century – "Whatever else we do, the learning programs we create have to be phenomenal."

The use of the word ‘phenomenal’ in the title drove Accenture to think beyond information transfer in learning, to focus on the learning experience itself, and on ensuring that it had a major impact on the career and development of the individual. They proposed four dimensions of phenomenal learning – learning, networking, enculturation and the guest experience. They also developed a definition in order to provide a goal in their design and development work: phenomenal learning means, "creating a surprising and delighting level of excellence in every aspect of the training experience".

All the above influenced the staff at UNC to articulate the belief that when you leverage the power of experience, through both on-the-job
learning experiences and more formal education programs you ultimately create unique, transformational and memorable experiences for participants.

Foundations for ExperienceBase™

ExperienceBase™ was developed as a product based on learning theory and satisfying a learning need, rather than a technology tool, although the physical product appeared before the supporting white paper. Dewey’s approach formed the core foundation for ExperienceBase™ in Jim Dean’s mind - a given situation exists, a person evaluates the options, makes a decision, acts on it, reflects on it and in reflection determines whether they will take the same or different action in the future. But the product was not just a 21st century manifestation of Dewey’s process. Its development was a classic example of extensive past experience feeding new ideas and designs. Although not explicit, Jim’s years of working in education, building on personal and industry-wide research on androgy, experiential learning and knowledge management, along with the recent stimulus of ideas such as phenomenal learning from Olson and Ceisel combined to form the concept, key features and approach to designing ExperienceBase™.

Based on the underlying learning theory and his experiences, Jim Dean believed that ‘reflection’ was the critical success factor; it was the one element that would add value and accelerate learning and development. The challenge was how to incorporate that approach into a tool and into the behavior of the people using it. It was this element that most strongly informed the design and directed the conversion of theory into practice.

From a learning perspective, asking executives to spend fifteen minutes at the end of each week reflecting on their key experiences may be very effective, but Jim recognised that in reality this is rarely sustainable. Diaries become fully booked, there are frequent interruptions and always another task to complete. In interviews with clients, Jim also discovered the cultural driver of ‘being seen to work’ - if someone was sitting back reflecting (‘doing nothing’), it did not fit with the company work ethic. Also, these thoughts could be lost quickly, not considered deeply enough and not shared widely, without some common knowledge management mechanism. However, executives do spend much of the day working at a computer (‘I am looking at my computer therefore I am working’ is culturally acceptable). Jim Dean’s objective therefore became a solution that portrayed hard work, provided a simple method of capturing and recording experiences and encouraged deeper reflection.

ExperienceBase™ is an electronic experience sharing platform that contains questions which are almost pure Dewey. The reflective element is reinforced by having one area where experiences are recorded, followed by a longer series of questions that probe the actions, impact and learning around that experience. Full details are provided in Section E below.
**ASPIRE©**

The ideas that were leading to the development of ExperienceBase™ along with the Accenture concept of ‘phenomenal learning’ stimulated the UNC team to take a step back to consider the wider design of experiential learning, based on a classic foundation of adult learning theory, but customized to UNC and its client base. The result was the ASPIRE© model and associated design process.

![Fig. 11: ASPIRE© model](image)

The process is initiated by understanding the business and client needs, but then moves to a mapping process, based on the concept that an integrated executive learning experience has six core elements: **social, physical, inspirational, rational, emotional** and **aesthetic**. A number of factors, such as the client need, the corporate culture and the prior experience of the participants, will then shape the design of the learning experience. Each client requirement may result in a solution based on a very different emphasis or balance of these elements. Individual approaches to learning (such as 360 feedback and action learning) are linked to each of the six elements, appearing in one or more depending on their suitability to enhance learning in that area. ExperienceBase™, for example, appears against the social, rational and emotional categories. The learning experience is then designed in detail pulling in the right mixture of learning approaches, activities and content in the right balance according to the chosen model.
The inspiration for UNC Kenan-Flagler’s approach to executive development and to the development of the ASPIRE model and ExperienceBase™ tool has a wide theoretical and practical foundation.

**Product description and development process**

The ExperienceBase™ product was developed from scratch, with a completely different design and software platform from the initial product used with Dow Chemicals. The developers made use of open source software ‘Ruby’ (based on a framework called ‘Rails’) which has a growing community of developers, and which allowed some features to be pulled in from the worldwide development community and modified, whilst others were developed to meet specific needs at UNC.

The product was developed according to the detailed specification provided by the UNC team to Terralien, the software development company, but the development was a team effort, and further enhancements were made as the product went through its iterative development cycle.

ExperienceBase™ consists of two core interlinked elements – the experiences themselves and a discussion forum. There are also areas for registration of participant details and administration of the database. The software was designed so that all recording of experiences and communication is anonymous, allowing those participating to record their experiences, actions and feelings without fear of comeback. However, names can be posted where the individual wishes. To further enhance the open sharing of experiences the tool is intended for use by cohorts of people which have been formed in a deliberate manner, either within an organization/special interest group or who have been through a leadership development program at UNC.

**Experiences**

The tool is intuitive to use and simple in its user interface. Following on from registration there is an area to record new experiences.

The screen is structured so that it provides what is believed to be the right balance of free format data entry and guidance. There is an area to enter the experience itself, followed by core questions that provide a more rounded and reflective account of the experience:

- What did you do?
- How did it turn out?
- What did you learn?

Each question has a section where supplementary questions can be added by the designer of that instance of ExperienceBase™. These questions help the author consider the answer in more detail, and allow for tailoring to given audiences.
- What was the situation you faced? Who was involved? Why was it significant? What did you do? What decision did you make and how did you implement it?

- How did it turn out? How did it impact the organization? How did it impact you and the other people involved?

- What did you learn from this? What (if anything) would you do differently in the future?

Fig. 12: A new experience

The screen is designed in such a way that scrolling is minimised. Each question and its supplementary text will only open up for data entry when selected. Additional information such as metadata search tags (keywords) can also be added which help classify the experiences for easier searching in the future.
Experiences can be searched in a number of ways.

- Recent – showing those added in the last (predefined) time period
- Highest rated – there is an Amazon-like rating capability for members of the cohort to rate others’ experiences and these experiences are then displayed in rated order.
- Popular – records those individual experiences viewed most often
- Mine – shows personal experiences.

On the right hand side of the screen in ExperienceBase™ is a visual representation of ‘most popular’ topics, based on the metatags assigned when each experience was created. Those at the top of the popularity list, containing the greatest number of experiences are shown in the largest font, and there are two other levels of popularity available. This dynamic ‘tag cloud’ floats slowly, attracting the user’s eye and encouraging further exploration of the database. The metatags are not based on pre-assigned terms, but follow the ‘wisdom of the crowds’ approach to allow the person documenting the experience to nominate the most appropriate words, consciously or unconsciously aided by the tag cloud at the side.

The search results will display the first few lines of the appropriate experiences in reverse date order and encourage active participation by other readers at this point – to read further or to comment.
Fig. 15: Browse screen showing three experiences
Discussions

There are a number of ways that individual experiences can link to deeper discussions and further development. In the ‘browse experience’ option, there is a link to a forum so that a given experience can form the basis of discussion amongst the participants. One of the unexpected developments so far has been the fact that there has been a high level of fellow participants using this linked discussion capability to help an author ‘solve’ unresolved issues or suggest ways forward based on their own experience, thus providing a natural community of support.

An experience can also be sent via email by its creator to someone outside ExperienceBase™ – a boss, coach or mentor, for example. It is hoped that this feature will help individuals in their own personal development, and also embed ExperienceBase™ in the culture of the organization.

Discussion does not have to originate from individual experiences and anyone within ExperienceBase™ can start a discussion thread on a given topic area.

The development experience

To an outside audience, in order to keep it simple, Jim Dean describes the innovation as the tool itself, a unique product which is able to promote executive development and learning from experience. Yet the development of this product is also a classic example of the innovation process at its best. It supplies key pointers to others who are keen to foster and encourage innovation within business schools.

In our research we have found a number of conditions which are present in innovative business schools and which can be illustrated through the ExperienceBase™ story.

The innovator

Jim Dean is an intelligent, widely-read and thoughtful personality. He is stimulated on a personal level by intellectual questions, and is able to make links between unrelated subjects to solve problems. He knows the executive development business well, and is curious about finding ways to improve it. Like many other innovators he has strong drive and ownership for his ideas. His colleagues comment that,

“Jim is a strategic thinker. He is also great at getting things done. You’ve got a great combination there.”

Research

A chance conversation started the ExperienceBase™ story, but it was followed up by further research with clients and with reflection on the nature of experience-based learning combined with a literature search. Jim also worked closely with a colleague, Tina Narron, to refine and develop the concept.
Although within ‘innovative’ schools some ideas originated from the client side and others were internal to the school, those that ultimately failed did so because they did not ‘fit’ a real need. The predecessor of ExperienceBase™ allowed Jim, Tina and the internal IT team to test out their ideas on design, usability, support and approach to capturing experiences. By the time it came to specifying ExperienceBase™ the team had a good idea of what they wanted and what would work.

**The partner – Terralien**

The UNC Executive Development team created a specification and a Request for Proposal, which was sent out to a number of organizations. Nathaniel Talbott of Terralien nearly rejected the project outright.

“Terralien’s focus is on innovative things, more than big enterprise work from large groups. When I see an RFP, I write it off, but Rich the designer felt it was a good fit to our skills, so I listened to his argument, we responded and were selected.”

Tina Narron comments, “We sent out an RFP because we genuinely didn’t have predetermined ideas on how it would develop. We picked Terralian precisely because they didn’t say ‘this is what you asked for so it will take this long to produce’. They asked us questions, made suggestions…..and even Adam, the technical guy, spoke English to me. We felt we could work with them as a team.”

Nathaniel feels that there are core elements that ensured the whole group created a product that went beyond the original specification:

“*When I am bringing guys on to my team I look for people who are not just software geeks or design artsy people. I look for those who are interested in the business side, who can think about ‘what can I contribute to make this a business success?’*”

The UNC team cite a number of areas where ‘innovation built on innovation’ as Terralien contributed to the design. Terralien took core concepts and found new ways of implementing them, making use of the open source community to discover new solutions, and came up with suggestions of their own – in the search, tag clouds, anonymity features, discussion area and, most importantly, an overall simplification of the design.

“*I was really pleased with how willing Tina and Jim were to simplify things. You are always worried when you have a well-defined spec that people won’t be willing to adjust and try new things. Instead of ‘that is not what we want’ we got ‘wow, that is a great idea’*, says Nathaniel.

In this project, an IT team, an external one at that, managed to work and communicate successfully with a largely non-technical client, to create a product that was a true reflection of the best both groups could offer. Flexibility and open-mindedness contributed to a better solution.
The team – UNC Kenan-Flagler

In a development scenario such as this one, an innovator cannot take an idea from concept to completion all alone. Initially the work involved primarily Jim, Tina and the Terralien team, but by early 2007 other people from the UNC Executive Development group and other support areas began to play a part. System and user testing were completed, the tool was linked into the school’s ASPIRE model for Executive Development design, as well as the program offerings and the sales process. A marketing program was developed under Barb Perkins, who had recently joined UNC. She has noticed that,

“The Executive Development team is small, and I found that people all roll up their sleeves here and work on everything if needed.”

There appears to be a mutual respect amongst everyone in the team, with a belief in the product and what it can offer. UNC Kenan-Flagler has a strong cultural ethos of making the whole learning experience a positive one for their clients. Perhaps this ingrained behavior has influenced the relationships within the team and their focus on quality deliverables, even if they are not learning programs.

Active marketing

The team developed a web microsite, a demo of the product and marketing collateral based around ‘learning through experience’, which were sent out to targeted organizations to raise awareness. As these products and services were developed the UNC team grew in their knowledge and understanding of ExperienceBase™ itself, and each of the players added his or her own expertise and suggestions, so that ownership by mid-2007 was truly shared.

Some of the barriers to the successful implementation of an innovation can often occur at the last hurdle. The effort may go into the development of the product or service, and the owner has a natural belief in its quality and potential for success, but unless that product is marketed both to potential clients and to peers who may have to use and, overtly or covertly, sell it themselves, then it may not gain wide acceptance. The UNC team clearly grasped this need.

Tools support learning and development

Quite often when a new tangible product or tool is developed, the focus is on the tool itself and the mechanics of how to use it. ExperienceBase™ has been designed and developed within a larger context, and is seen as a means to develop people, not the solution in of itself. Rich the designer’s insistence on simplification at every step has resulted in two major advantages for ExperienceBase™. Any tool which involves people and their own lives will have a natural barrier to its use before starting – exposing your own work to scrutiny is not easy. If a tool is difficult to use, especially one aimed at a senior level audience, then it will never work. The fact that ExperienceBase™ is simple in design has also meant the tool can be used in multiple ways, giving it greater flexibility.
The UNC team has a primary use for it, but already some individuals have developed a spontaneous peer support group to help others who have posted a current experience as a dilemma rather than a fait accompli. Other organizations have shown an interest in it as a ‘living book’ documenting best practice. Barb Perkins, having experienced major mergers in her career, has suggested that it may be of use to newly merged teams to post their best ideas on new corporate processes, and to help these teams bond and support each other.

**The Clients**

"ExperienceBase™ puts your network within reach. They are only a click away."

*Lisa Reynolds, Principal of Roseboro-Salemburg Middle School*

No matter how confident a development team may be, it is only when a product is used in anger that the power and value of such a tool can be shown. In addition, the clients who go through the pre-production versions of the product need tolerance to understand that it is a work-in-progress and honesty to communicate constructive feedback.

A group from the Survival School for New Principals (SSNP) program (a cohort of 40 people who have recently become school principals) has been using ExperienceBase™ since the summer of 2007 and the participants provided personal feedback for this study. Alisa McLean the Program Director claims that “the concept is fantastic and I hope it takes off as a learning tool for all groups”. From her point of view as Director, it is a tool that should provide her with “insight into the needs, wants and thoughts of the program participants,” which she may not otherwise be able to obtain outside the classroom.

Lisa Reynolds, Principal of Roseboro-Salemburg Middle School, highlights the ease of use of the tool. “Many web designers fill their web pages with excessive amounts of bells and whistles like floating graphics, complicated menu bars and obnoxious sound effects. The simplicity of ExperienceBase’s™ basic web design makes it more user-friendly whilst appearing professional”.

The targeting of the audiences chosen to use the product and the applicability of the product to their roles are also key to its success. 100% of the people interviewed said that the ExperienceBase™ content was relevant to their role. Donald Hampton, Principal of Middle Fork Elementary adds, “there are many ways to make mistakes in this job and if I can avoid some because of lessons learned by others then I am very grateful”. Ultimately the people using ExperienceBase™ need to feel a strong motivation to be part of a trusting community and to contribute to the knowledge and experience of that community. Here the human factors come in, and consequentially the motivation may vary from one group to another. The UNC team can help increase that belief through good marketing and facilitation, but the personal and ‘corporate’ culture will always play a strong part.

All the clients interviewed from the SSNP program showed concern about confidentiality and how this may restrict the quality of content.
within ExperienceBase™️. Martinette Horner, Principal of Hillsborough Elementary School says, “You never know who is reading and who is connected. I hope everyone abides by the rules of confidentiality, but I don’t trust it yet”. One other contributor says, “I have not entered some accounts because I do not want to be identified. I do not want my superiors to know that I made mistakes...but the best lessons are ones that involve information that could hurt someone professionally or personally. There are great stories that will never be told because people will be afraid that their identity can somehow be ascertained”.

These clients have strong insights into the salient challenges and opportunities ahead for their specific group, which should provide a good basis for the UNC team to move forward.

**The environment**

Of course there are constraints to innovation, ranging from legal and institutional requirements to budgets. This project was fortunate in that its inventor was in a senior position, able to make strategic decisions on direction and budget allocations, operating only within the constraints of running a profit center. The project scope was also carefully designed to be contained so that it used moderate finance and resources.

Although there have been some examples in our research of ‘lone wolves’ driving an innovative idea through to implementation, in most cases the schools provide an environment which supports creativity. Barb Perkins comments,

“*Innovation is part of our life here at UNC; the environment is ‘we can make a difference’, and we know we can’t rest on our laurels, because the world moves on and it doesn’t wait.*”

**Challenges and constraints**

- One challenge that came as a surprise to Jim Dean was the **effort required to sell the concept** initially – its purpose, how it worked, and where it added value.

  “*One thing I underestimated with ExperienceBase™️ was explaining it all. I come from academia, not business. The way I think is still too academic, but there again without an academic background I may not have come up with the idea in the first place. Most people do get to the ah-ha moment, but it has taken more time and effort that I expected to explain it, although I guess with hindsight I could have expected it.*”

- **Confidentiality and trust** is an ongoing challenge as evidenced by the client feedback. The system is anonymous, but some individuals are still wary of contributing recent experiences in a current job role. Others have said they will put in experiences with a positive outcome, not those that turned out badly. Yet both the UNC team and the clients believe that these experiences are in fact the most valuable. It
takes time to develop a community which trusts and supports its members. For the moment the product is therefore limited to cohorts within a company or within a learning program at UNC, amongst trusted individuals. But there are two sides to the confidentiality argument within smaller communities. Knowing the background of the contributors may enhance understanding and learning, so anonymity may not always be best. The group needs to be very secure and highly trusting for this approach to work. Where individuals are loosely bonded together, possibly not yet secure in their roles and the community is small, then even anonymous postings may not contain the most powerful or most recent learning experiences. As time goes on, the UNC team and clients will be looking to find ways of maximising the experiences of all participants without pressure of negative personal feedback to named individuals. It will be the core challenge of the cohort administrator to drive the commitment and to ensure confidentiality.

- As with all knowledge management tools, maintenance over time can become an issue, once volume grows to a certain level. ExperienceBase™ is designed to be facilitated and managed by the learning communities themselves, but over time that job may grow in order to maintain a high quality, easily-searched database, with regular, active participation by a majority of the community.

**Key success factors**

In summary from the section above, the critical success factors were:

- A strategic, driven individual with a great idea and strong ownership

- Building the right team

- Flexibility in design

- Internal and external marketing

- Supportive clients who can test the product and articulate future development needs

- An environment which encourages innovation, experimentation and development of new ideas.

**Evidence of impact**

Although the product is still new, the impact has been shown at a number of different levels amongst the groups of users. For those who are new in their jobs, like the SSNP participants, it has worked on an emotional support level. Lisa Reynolds comments, “It is comforting to know that others may be going through the same things”. Donald Hampton, Principal of Middle Fork Elementary, echoes that sentiment, “It helps me to realise I am not alone in this challenging job,” and believes it may have further stress-relieving
Capabilities: “It could serve as a pressure relief valve as one recounts a story that could only be told anonymously”.

So far the impact has been more of a ‘reading’ experience for many, and as Chris Hitch of UNC says, “you need a critical mass to see the real benefit out of it”. MartiNette Horner feels she has gained from others’ experience, even if she has not yet contributed much herself. “I am a lurker, I like to read what is going on with others,” and a number of contributors agree with her.

At a program level, it is important to understand the values on which the learning objectives are based. In the case of two and three-star Navy Admirals, Chris Hitch comments, “we all soon realised it was an effective method to capture collective wisdom that could be passed on to junior officers or back to UNC to enrich the programs. It’s especially important as the baby boomer generation retires to develop those who are coming on”. Some of the Admirals’ entries struck a chord with Jim Dean. There was a consistent message that when you transition into a more senior job you find that people don’t tell you the whole story, and there is much to gain from knowing that in advance. “That’s the $100m lesson for me”, he notes.

At Microsoft Europe the tool was a vehicle to encourage employees to learn collaboratively without direction and to increase reflection, feedback and coaching internally and it achieved those aims.

Into the future

The ExperienceBase™ product is still in its beta form. It is currently offered to all organizations who come on a custom program at the business school and is built into the ASPIRE© model and needs analysis process. However, not all clients will choose to use it. The aim is to start rolling it out to further organizations through 2008 and possibly license it to certain business schools.

The product is robust in its design, having gone through two iterations to reach its current state, but the focus for the future is on features which extend the learning experience, as well as improved administration tools. One area being explored is an Amazon-like feature (“If you like this you might want to see...” ) to, as Jim Dean comments, “exploit that teachable moment” where associated content (video clips, articles on best practice) support experiences in a given subject area.

As more people use ExperienceBase™ the requirements for future changes will grow. However from feedback it does appear that in this first release the team has certainly achieved a resounding design success in terms of useability. Client feedback for improvements so far include opening it up to a wider audience to gain a richer level of experiences, and provide more time-saving ideas like ‘Google alerts’ of postings relevant to the user as well as further searching shortcuts.

The greatest challenge will be on the human side, rather than in development of the tool. Barb Perkins and the team at UNC Kenan-Flagler are well aware that there is a growing need for good quality business champions and facilitators to keep the momentum going,
the content accessible and to continue to build good-sized active, trusting communities.

The product is actually generic and flexible, and there are already alternative uses being put forward. One idea would be to collate experiences from a knowledgeable group, say the 50 top executives from UNC alumni, to develop a dynamic ‘guidebook for leadership’ inside ExperienceBase™. Jim says “I am really keen to mine a growing asset of experience for our clients”.

There are many ideas bubbling up in Jim Dean’s mind, and he sees that, in true collaborative learning fashion, the users of ExperienceBase™ may come up with further adaptations.

"Is this the Model T Ford of the experience world? It could be an early version that develops into something greater with time and with changes in technology. It will probably be different in ways I can’t yet see."

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Key reference


References


Changing the Amcor story: developing leadership and mapping organizational change using archetypes, group dynamics and narrative analysis

With special thanks to Phill Boas, Mt Eliza Centre for Executive Education, Melbourne, John Evans, Cultural Imprint and Glenda Hutchinson, Amcor Australasia for their time, openness and hospitality.

Introduction

This case study describes the Amcor Strategic Leading Program. The program was selected for its innovation in combining theories and practices of individual and group transformation with software-enabled narrative analysis to support leadership development and organizational change. The program also built on research relating specifically to Australian work culture and leadership.

Overview

The Amcor Strategic Leading Program, run for the first time in 2007, used an intense group dynamics-based learning framework to create a powerful set of supportive relationships between senior leaders across a disparate organization.

At the start of the program, direct reports of the program participants created a collection of leadership archetypes representing themselves and their bosses using a structured narrative analysis technique. During the program participants also created a collection of leadership archetypes. When they had done so, participants were shown the archetypes their reports had created and they plotted both sets of archetypes - which are represented literally as cartoon characters - against existing culture maps of leadership in the Australian work culture. The plot provided a snapshot of current leadership behavior in the organization.

Participants then engaged in an intense two-module program (7 + 5 days, one month apart) that sought to provoke personal and group transformation, and facilitate skills development to enable them to take ownership for, and work on, leadership behavior and culture within their businesses.

At the end of the program, a process was established whereby each participant, his/her boss and reports two levels down continue to tell stories on a regular basis, indexing them against a number of criteria. A user-friendly software tool is used to facilitate the process and interpret the data, thus providing an efficient way of tracking changes in leadership behavior at senior levels across the organization.
Origin and rationale

Amcor Australasia is a diverse group of manufacturing businesses that operate with significant autonomy from one another and from Amcor globally. In 2004 the businesses were struggling in the face of stiff competition, high raw materials prices, internal restructuring and changes in market focus. Staff turnover was high, and morale low. There were no processes for support and sharing across the silos within the organization, and senior leaders operated in isolation.

This was the situation facing Glenda Hutchinson, General Manager Leadership and Organizational Development, when she was hired to ‘do leadership’ in January 2004. Glenda recognised the importance of making connections and building relationships between senior leaders across the organization in order to share stories and leverage learning from business successes and failures.

Glenda was clear on what she wanted, and believed that the right complement of skills and experience could only be found between two people she knew in Australia – Phill Boas of Mount Eliza, Melbourne Business School, and John Evans of Cultural Imprint.

Thus a partnership between Amcor Australasia, Mount Eliza and Cultural Imprint was initiated, and the seeds of the Amcor Strategic Leading Program sown. This all happened early on in 2006, it took a further 12 months before the program was finally launched and run for the first time in February – March 2007.

Theoretical perspectives and key methodologies

When Glenda contacted Phill and John, it was on the basis of their expertise in using stories to understand and track behavior, and their contrasting, but complementary, approaches to facilitating individual and group transformation. Whilst very different in many ways, uniting them is a desire to create deep, sustainable change and the skills to facilitate intense intra- and interpersonal interventions.

John’s research over the past 15 years has focused on understanding the emotional and behavioral preferences that Australian workers have of their leaders. Two of the cultural models developed from this research, The Bridge and the Oz Model, were used as a basis for the design of the program. The models were used to help participants understand the Australian workplace, and as frameworks for measuring change after the program. Recently, and in conjunction with Hewitt Associates, John has used data from 55,000 people from 167 organizations to report on the main predictors of Employee Engagement in Australia. These findings were also incorporated into the course design and post-program measures.

Phill helps clients focus on substantive issues below The Green Line – his conceptual division of the rational (above) and the emotional (below) components of organizational life and change. The Green Line was used as one of the overarching elements of the design frame for the Amcor program. Phill and John built a carefully balanced interchange between the processes below The Green Line, which
enhanced the relational and communication processes of the group. Phill worked primarily to build the connections between peers whilst John worked with more structured processes to enhance the communication between participants and their subordinates and participants and their bosses. An Action Learning component was established that kicked into action between the two residential elements of the program and immediately following them.

The process of **leadership archetype extraction** was developed by Dave Snowden of Cognitive Edge Pte Ltd\(^1\), and used in the Amcor Strategic Leading Program in combination with The Bridge and Oz Model.

At a metadesign level, some of the Amcor program mirrors a form of **search conference/common ground technology**, devised by Marvin Weisbord (1987, 1995) and Sandra Janoff\(^2\) (1995).

The final element in the mix is the ongoing use of **narrative capture** and **analysis** to track individual and organizational development through the indexing of experiences.

Below is a description of each of the elements:

**Leadership Archetype Extraction**

Dave Snowden of Cognitive Edge developed the method of leadership archetype extraction as a way of identifying leadership characteristics, behavior and problems in an organization. Their process is based on the premise that it's important to provide anonymity and protection to individuals, whilst keeping closely connected with organizational reality. So, people tell stories, from which key themes are extracted, sorted and extracted again. Cognitive Edge describes this as the two levels of emergence, or removal, from the raw data.

**How it works:**

**Step one:** participants tell stories in a group about good, bad and indifferent leadership behavior in their organization. The scenario given is: “Imagine you’re at a barbeque. What stories would you tell someone to lead them to decide whether they’d want to take a job in your organization or not?” (– this way of framing the scenario is a form of social stimulation, or social contexting). Everyone in the group tells a story. Some people will describe specific incidents, others will put together a whole lot of experiences and tell a composite story.

**Step two:** whilst the storyteller is speaking, everyone in the group jots down notes on what they are hearing about the people (character types), behavior (actions) and issues (problems) in the story.

**Step three:** an informal thematic analysis, where collections of group members clump together similar notes from all the stories and labels.

\(^1\) See [www.cognitive-edge.com](http://www.cognitive-edge.com)

\(^2\) See [www.futuresearch.net](http://www.futuresearch.net)
the clump. The notes are then removed, just leaving the labels on display on the wall.

Step four: the second stage of removal/emergence – participants take each label and say what the positive and negative attributes are of that particular label, still keeping the labels in three separate groups around people, behavior and issues.

Step five: remove the labels, and just leave the positive and negative attributes. (At this stage in the Amcor program, the issues were dropped in order to focus on people and behavior).

Step six: participants are instructed to create characters as if they were writing a book about their organization. Working in pairs, they develop characters based a number of the positive and negative attributes. Every character is given a name and a descriptor – a short description of their personality.

Step seven: participants repeat the process, but this time writing short scenarios that typify behaviors in their organization. Again, these must be based on the positive and negative attributes up on the wall.

Step eight: the group is then asked whether their organization promotes, tolerates or rejects these behaviors.

The group has now collectively created a picture of the characters that exist and the leadership behaviors that are perceived to occur inside their organization. It is a powerful process for creating ownership and commitment to what may be an ugly reality.

A cartoonist was present while participants were describing their characters and he drew a unique visual representation of each character.

Interestingly, John describes that “groups from different organizations create hugely different archetypes”, revealing a considerable variation in the state of ‘organizational health’ of different organizations. Whilst this process has been developed, refined and used by Cognitive Edge in various formats over a number of years, what was new in the Amcor program was to link the archetypes to culture maps of leadership – The Bridge and the Oz Model.
Miss Fit

I try to do the right thing and create a good work environment for my team. After a while it becomes so hard I decide not to take it too seriously. After all, people don’t listen to me – it’s best to go with the flow. I can be flexible when it’s needed for me or my team but I won’t look for new challenges or knock myself out if no one is interested.

Comedian 2
Unhappy 1
Passenger 1
Poor Communicator 1
Flexible 1
Lacks Direction 1
Team Player 1
Comfort Zone 1

Long Term Larry

He has been with the company ‘forever’ and knows everything about the place. A great go-to person for anything that comes up. Always ready to help others. Has earned his position over many years hard work and dedication. First name basis with everyone – including senior management.


Good communicator 2
Helpful 2
Supportive 2
Flexible 1
Team player 1
Motivated 1
Unskilled 1

Figs. 16 & 17: Leadership archetypes
The Bridge

The Bridge is one of two models developed by Cultural Imprint based on research over the past 15 years into what Australians want from their leaders and bosses. The Bridge has two axes: the first is a composite of support and direction and is called: ‘to build bridges (to provide direction and support) – to undermine’. The second relates to the motives of the leaders and is ‘to care – to not care’. Both are composites of a number of variables. So, whilst it appears simple, The Bridge is actually a condensed representation of 24 individual elements. John explains that “it provides a very simple frame on which to scale and score a whole raft of activity we see in the workplace”.

Fig. 18: The Bridge

The Oz Model

Whilst The Bridge positions emotions, feelings, intentions, character traits, and behaviors, of a would-be leader, the Oz Model is concerned with how the same factors affect a follower. Once again, the model has two main axes: ‘to be ok - to not be ok’ and ‘to be in feeling mode – to not be in feeling mode’. As in The Bridge, the Oz Model is created from a number of separate elements (n=8), and is used to provide a simple frame from which to work with individuals and groups.
In both models, the top right hand area of the plot represents the most desirable positioning for leaders and followers in Australian organizations. Bottom left is least desirable, and progress should ideally be in an “up and right” direction.

The Bridge and Oz Model were presented to the Amcor group after they had developed the leadership archetypes of their organization. The models were explained, and endorsed by the group, and the link was made between these models and the characters and scenarios they had just created. The participants were then asked to plot each of their archetypes onto The Bridge (the cartoon characters) and the Oz Model (the scenarios). This provided them with a visual representation of current leadership practice in Amcor.

**Narrative capture and analysis**

Whilst storytelling is nothing new, the systematic and systemic collection of narrative as data, and using this data to track individual and organizational development, is a creative and unusual approach to organization development. In the Amcor program, stories were used throughout: in the early stages to generate leadership archetypes, between modules and lastly, and most enduringly, after the program for the ongoing mapping of leadership behavior at the level of the individual and organization.

Software to enable narrative capture and analysis is entirely web-based and members of staff log-in to record their stories. After writing out their story and completing a section with basic ‘biographical’ data (function, site, length of service with Amcor – sufficient to provide context, and pinpoint with reasonable accuracy from which part of the organization the story has come, but not detailed enough to be able to identify individuals), people then index the story against a number of variables – all of which are elements of The Bridge and the Oz Model. The user interface is straightforward and intuitive, and it takes 10-20 minutes on average for someone to
write and score their story. The configuration of ratings a person
gives their story determines its position when it is analysed by the
software and plotted on The Bridge and the Oz Models.

The idea is that narratives will be captured on a regular basis, from
participants, their bosses, and two levels down (their direct reports
and their reports). It should become apparent within a short space of
time – just a couple of months – whether the Amcor program has had
any impact in changing leadership behavior in the organization. This
would be demonstrated through a trend in the scatterplots (each
point representing one story) toward the top right quadrant on The
Bridge and Oz Model. Particular anomalies – e.g. clusters of points in
unexpected/undesired locations, can be traced back to the
experiences that positioned them there, and action taken to address
specific issues where appropriate.

This is the first time, as far as we know, that narrative analysis and
cultural mapping have been correlated in this way.

**Search conference/ Common ground technology**

The terms *search conference* or *common ground technology* are
synonymous for the recognised structured approach for getting
people who wouldn’t normally work together to work together. One
of the critical elements is early on to get the group to a stage where
everyone in it fully trusts themselves and others and is capable of
dealing with high levels of emotion. To reach the level of trust
required demands a great deal of self disclosure, and skilled
facilitation to support the process.

**The Green Line**

First articulated when Phill and a colleague were running a leadership
program for BHP Steel in 1992, the Green Line has subsequently been
developed into a model of management and leadership for
organizations seeking behavioral culture change. It draws on the
research of a number of leading thinkers in leadership and
organization behavior.

(Quoting from a paper (2007) by Phill that describes the Green Line
in great detail...) In essence, an organization can achieve change
through one of three means: changing the overall pattern that it uses
to undertake its tasks or functions, changing the structures that it
uses, or changing the processes that it uses – these three possibilities
are all referred to as being above the green line (ATGL). Things ATGL
are logical, rational, technical – the management operations of a
business.

However, in order for change to be maximally impactful, then three
other conditions apply: information must be freely available to all
members of the organization, relationships within the organization
must be such that people behave toward one another in mutually
respectful and sensitive ways and the sense of self of the people in
the organization must be such that they feel that they are in sufficient
control of their lives that choices about their futures will not be made
without them being consulted in some genuine and respectful way.
These three conditions are referred to as below the green line (BTGL). Things BTGL are relational and, typically, far less attention – if any – is paid to them in programs seeking to achieve organizational change.

Phill and John used the Green Line to frame the design of the program, and referred back to it, unpacking and using its different components, throughout the two modules.

**Relationship-building techniques used**

- **Walk-talk partners** (based on Pfeiffer & Jones’ (e.g. 1975) work on Structured Learning Experiences)
- **Giants and dwarves** – an invisible care-taking structure where everyone in the group chooses a ‘giant’ for whom they do something positive every day – the ‘dwarf’ never reveals who their ‘giant’ is, so the ‘giant’ never knows who is looking after them. After a few days, the participants describe what it felt like to care and be taken care of.
- **Photo-groups** – a technique developed in the US for building six-person work groups.
- Non-directive counselling approaches.
- Also *Gestalt, NLP* (neuro linguistic programming), non-directive counselling maps, action and psychodramatic processes – all focusing on building relational skills capacity.
Skills-building models

- **Helping Others Succeed** - developed by BlessingWhite Inc³. Whilst initially looking like a coaching conversation, Helping Others Succeed is actually about the manager and their capability as a coach. Coachees provide feedback on a ranking-based system, so that the manager has a focus on the areas where they require improving, rather than an absolute assessment of ability. In between the modules, one of the tasks for participants was to have a conversation with a subordinate about their competence as a coach.

- **PICER structured communication** is a set of critical steps which can help when having to conduct a variety of difficult conversations. These steps were initially devised by Greg Meyer (Greg Meyer Seminars Pty Ltd) and have been adapted by John. They are similar to many found in behavior modelling programs.

- **MPG ‘The Success Connection’** is also from the BlessingWhite stable. It provides a process for influencing upwards about the things that really matter to the individual and to the company. It helps balance organizational imperatives, individual talents and career goals, and identify actions that will maximize individual contribution to the organization. It culminates in a meeting with the manager (one-up) to concretise a strategy for achievement. This paves the way for continuing effective one-up dialogue.

Program description

The main approaches used in the Amcor program have been outlined above. What follows is a brief description of the program from start to finish.

In essence, the program comprised two interwoven tracks:

1. Processes to engender profound personal and group transformation so that participants recognised and took responsibility for their own and others dysfunctional behaviors, and became ready to tackle them.
2. Skills-building to equip them with tools and techniques so they could address difficult issues and make changes back in the workplace.

Before the program

Before the first workshop, a group of 30-40 of the program participants’ direct reports were invited on a half-day workshop where they created leadership archetypes using the Cognitive Edge method of archetype extraction described above. This same process was repeated with the 15 program participants at the start of the first module of the Strategic Leading program.

³ See [www.blessingwhite.com](http://www.blessingwhite.com)
During the program

During the next two-and-a-half days of the program, participants were immersed in an intense data gathering exercise - part of the search conference process of generating incontrovertible data for later use. This included MBTI data, data about participants’ relationships – professional and personal, photographs of people they loved, hated, trusted, didn’t trust, a ‘history wall’ providing a backward glance of Amcor over recent years – major events, external pressures, how people felt, and finally, the leadership archetype data.

By the end of day three, Phill and John offered participants the opportunity to take responsibility for the data and its implications, and to decide whether or not they wanted to address the issues arising. John framed the question to the group: “OK, you’re in the data cesspit. You generated it, you need to sort it out, it would be inappropriate for anyone else to do this. When you’ve decided who’s responsible, and if you really want to do something about it, you should come and talk with us.”

In parallel with structured exercises led by John for collecting data, Phill worked with the group on their own group process, building trust and strengthening relationships within a ‘do no harm’ framework. It was imperative that the group developed strong, trusting relationships with one another in order to be able to ask for help and offer support before attempting to tackle the challenges presented to them.

Throughout modules one and two, Phill and John worked complementarily: Phill using right brain, highly disordered behavioral and relational processes to help participants deal with themselves and each other, and John working from a left brain, logical perspective presenting tools and structures to help them engage with problem solving back in the workplace – how to structure conversations, run self-managed workgroups, manage bosses, give and receive feedback and so on (The key relationship-building techniques and skills-building models are described above). Phill and John referred to the Green Line to explain their different approaches and why they were using them.

Phill describes his aspiration: “We want them to be able to deal with each other and with their bosses better, so they are able to manage their subordinates with more respect, their colleagues with more capability and honesty, and their bosses with less fear.”

The room was set up to distinguish between the structured and disordered – at one end tables and chairs were set up in a formal arrangement (John’s structured end) and at the other was a rough circle of chairs (Phill’s unstructured end).

In addition to their own input, Phill and John brought in three different external groups to run particular sessions and change the flow of the program. The first was the Victoria College of the Arts who got the group to make and play music together, and the other two were both theatre groups. The Playback Theatre Group took scenarios from the group and played them back, and another group
of actors, Dramatic Edge, who performed examples of behavior from the Cultural Imprint cultural maps to provide a different way of presenting theoretical material.

**After the program**

Participants left the program with a heightened awareness of themselves, how others perceive them and with a strong support network in the form of the other participants. As well as using this awareness alongside the tools and techniques they had learned, a major post-program activity is the ongoing, systematic use of narrative capture and analysis to track changes in individual and organizational leadership behavior. As described above, this extends beyond the participants to include their bosses and two levels down of report. At the time of writing, it is too early to report on the changes recognised and reported using this approach.

**Challenges and constraints**

- **Securing commitment from the executive to run the program**, with a realistic budget, at a time of great financial pressure on the business. Glenda had to fight hard to secure the endorsement of the executive and a realistic budget to deliver a senior leader development intervention that would really make an impact.

- It was only a timely combination of factors that eventually got the desired program off the ground: Glenda handing in her notice in frustration at not moving forward with leadership development in the business; positive feedback from the business about other OD interventions; the strong relationship of Glenda with her boss, Melanie Huson, Group General Manager HR and Operating Risk and Melanie’s influence with the executive of Amcor Australasia. If any one of these elements had been missing, Glenda suspects that the program would have flopped before it even got off the ground.

- **Convincing the executive of the need to take participants away for a solid block of time.** Phill and John worked up a sub-optimal design of 2-3 day modules when it appeared that they were not going to get sign-off for the program design they wanted. However, having been herself convinced, Melanie finally managed to persuade the executive that whilst this design might deliver some of the program objectives, it would not have the impact sought. The two-module, 7 + 5 day design was finally signed off.

- **Managing preparation time in order to develop a sufficient depth of mutual understanding and trust** that Phill and John could design and deliver a program with the level of complexity of the Strategic Leading Program. Not only had they never worked together before, but the pair was aiming to integrate a number of distinctive approaches, in ways that had never been done before, in order to achieve highly ambitious outcomes for the organization. They achieved
this by investing a significant amount of their own time beyond the design time that Amcor funded.

- **Working with a group of very senior people who are sceptical of the value of leadership development.** The usual challenges applied: securing their buy-in up front to take the time out from their businesses to come on the program (this was achieved by skilful positioning and persuasion from the Amcor OD team) and keeping them engaged through a process that was entirely different from their day-to-day rational workplace environment. Phill and John “let the program do the convincing” and trusting from their experience that the process would convince the participants of the program’s value.

- **Authentic delivery.** In addition to designing a cohesive and coherent program, another challenge facing Phill and John was to actually deliver it in an authentic way. They did this by modelling the trust, behavior and openness that they expected from participants, having spent almost a year leading up to the program building this trust and mutual respect.

- **Embedding narrative analysis.** Glenda recognises that the ongoing use of narrative analysis and capture will need more of her support than she had anticipated if it is to become truly embedded throughout the organization. Once the next group has graduated from the program, the critical mass of senior people who fully understand the process of using this process to monitor organizational culture and behavior should help this embedding. A third group will then be considered with implementation in early 2008.

**Key success factors**

- **A highly competent and well-respected internal champion.** Having Glenda and her boss, Melanie Huson onboard made it possible to secure the leverage required for all sorts of critical decisions: to run the program in the first place, to get the right participants involved, to have the freedom to use risky and high-intensity processes during the program, to test out a unique blend of approaches.

- **Skilled, risk-embracing facilitators.** Phill and John were prepared to try out new things, by combining their respective skills and experience. Together with Glenda, they also committed significant time and energy to building their relationships and in developing a robust program design.

- **Participants as ambassadors for change.** Going forward, the program participants, individually and as a group, will be important in embedding change, particularly through ongoing use and advocacy of narrative analysis.
Evidence of impact

The various elements of the program, including leadership archetypes, cultural maps, narrative analysis and search conference technology, have been tried and tested in a variety of situations over the years.

As yet, it is too early to demonstrate fully the impact this program, with its blend of approaches delivered in the context of a highly siloed group of businesses, has had on the organization. Impact should be recognised through behavioral change – at home and in the workplace - participants building better relationships, feeling better about working at Amcor and being positive about how and what they can influence and achieve. This will be further evidenced through maintaining desired retention levels, more career opportunities for people across all businesses and ultimately bottom line improvements.

Early signs that the participants gained value from the program include: participants adopting the narrative analysis approach to address specific issues within their businesses; participants experimenting with – and reporting positive feedback on – various tools and techniques introduced during the program; the group investing a serious amount of time in preparing a presentation to the executive about the program and their perception of its value; and the articulation, through stories, of the deep impact of the program on individuals in their post-program feedback/evaluation.

Into the future, success of the intervention at an organizational level should be visible through movement of behavior and feelings on The Bridge and Oz Models in a favourable direction (towards top right) as program participants, their bosses and two levels down report experiences. John anticipates that if change is going to happen, it will be demonstrated in the first couple of months following the program.

Into the future

One further group is scheduled to go through the Strategic Leading program, from September 2007 through to 2008. The program will be run in more or less the same format, with small tweaks as a result of learning from the first run (for example, building in action learning after the residential modules and linking a problem analysis model with current work issues). Participants will again be drawn from the top two layers of leadership within Amcor Australasia, i.e. a mixture of General Managers and Group General Managers.

Once this group has ‘graduated’, approximately 30 of the 60 most senior leaders in Amcor Australasia will have been through the program. This is sufficient, in Phill’s, John’s and Glenda’s mind, to create the critical mass of people with a different way of looking at leadership to embed real change across the organization AND to provoke unanticipated outcomes. For example, changes in the way the different businesses under the Amcor umbrella relate to one another and in the way they do business. A third program will be considered at that time, with implementation in early 2008.
There are already plans to bring the first group back together for half- or one-day sessions to revitalise their strength as a group, and provide further development around, for example, using complexity in problem solving, network stimulation techniques and more on imprint and narrative analysis. There may also be opportunities to work with all 45 participants after two groups have completed the program.

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“Muscle Memory: the Future Leaders Experience at the Foreign and Commonwealth Office”

With thanks to the following for their contribution: Andrew Millar of the FCO, and Eve Poole, Megan Reitz, James Morrison, Kate Charlton, Angela Whelan, Eddie Blass and Melissa Carr of Ashridge.

Introduction

This case study describes the Foreign and Commonwealth Office development program for Band D officers. It explains the underlying research on ‘learning for the future from hindsight’ that led to a new model of learning, and the challenges to both the faculty and participants in undergoing an intensive self-reflective experiential program offering longer term ROI.

Overview

In 2006 Ashridge created a very different tailored executive program based on a new experiential learning model. Initially developed as an Open offering, the program was tailored specifically to meet the needs of the Foreign and Commonwealth Office (FCO) Band D officers, those immediately below senior management level. The FCO represents and promotes Britain abroad, providing Consular Services for British nationals around the world. Those at Band D are at a critical stage in their careers, looking to enhance and develop their high level management skills in a changing global environment.

The FCO Development Program grew out of a relatively new program known as the Future Leaders Experience (FLE) founded on research within Ashridge and an increasing need to find an accelerated learning mechanism for emerging senior leaders.

The programme runs for four days including a one day business simulation. It is an intense learning experience involving a variety of activities aligned to the Band D competence framework with a strong focus on delivering through others by increased self-awareness.

Program origin and rationale

“There was nothing for those ‘leaders in waiting’ that would help them to exploit their potential as leaders much earlier on.”

Eve Poole, founder of the original FLE program

In 2003 and 2004 a gap in leadership development triggered discussion amongst faculty at Ashridge about how best to accelerate the development of individuals in the middle of an organisation to make them ‘job ready’ for a more senior leadership role. The Ashridge Leadership Programme, designed for advanced leaders, was attracting more and more junior applicants seeking guidance in this area. Research showed that competitors approached this subject in a
variety of ways, but often the learning was designed around the two extremes of general management tools and processes, or advanced leadership. In many cases corporations took it upon themselves to run in-house programs for their 25-35 year old high potentials, believing that this area could only be covered within their own culture. These in-house programs were often light on learning theory, although rich in corporate culture and experience. Overall there appeared to be a gap in the learning portfolio available to future leaders. The publication in 2004 of Phil Hodgson’s ‘Top Leader Journey’ triggered further discussions within Ashridge on the development of leaders and how a business school could best help in that process.

The Ashridge Leadership team proceeded to interview seventeen business professionals to uncover further information on how individuals made the step from ‘manager’ to ‘leader,’ but frustratingly they found that many leaders were unable to articulate the drivers and circumstances of that conversion. Frequently they just ‘parroted back’ standard theories on the differences between the two roles. One question however, yielded valuable results – “what do you wish you had known ten years ago?” The research team then refined and augmented this research question to delve deeper, using a much larger pool of people and eventually discussing the topic with a total population of 314 individuals. From this research, three key critical success factors emerged along the leadership learning journey. The most influential was greater self-awareness, strongly supported by knowledge learned often from mistakes and from realising the impact of one’s own behavior on others. Eve Poole, who led the research team, concluded that “20:20 leadership hindsight arises from what people perceive as critical incidents during their working lives.”

Based on these findings, the team decided to develop a program that would accelerate self-development through early exposure to these critical leadership incidents. The aim was to use a simulated environment to develop ‘muscle memory’ for the participants so they would be better equipped to deal with real incidents in the future. “We wanted to create a program which gave them 20:20 foresight, based on sound academic theory and real practice, so they could greet new challenges like an old friend,” comments Eve.

At this point, as Eve describes it, “in the spirit of action research and enquiry we moved to the Sony Walkman model of product development – design a prototype first and see the reaction.” The model was tested with four focus groups of eight people, the first three were at director level and the final one comprised a sample target audience of high potential future leaders. The resulting feedback allowed the team to refine the design. It was a departure from many of the standard Ashridge open programs at the time. Not only was it more deeply rooted in psychology and individual coaching, the learning depended on a high degree of cognitive dissonance throughout the event, raising the pressure on the tutor team and risking poorer scores on the ‘happy sheets’ at the end. The first pilot of the FLE was held in November 2004 with eighteen people. Because there was a strong focus on self-awareness and scrutiny of each
individual’s performance, it was uncomfortable for many of the participants. Eve notes,

“We had decided we would rather be effective than appreciated, but it’s tough.”

The team wanted to run the open program a few times before working with a tailored client, so began looking for tailored opportunities in late 2005/2006 once the concepts and design had been proven. There is obvious added value when such experiential learning is designed around one corporate culture so that multiple cohorts from the same business can experience the same learning opportunity. However, when approached, many potential FLE clients were excited about Ashridge’s innovative approach to the learning, but felt it was too risky a move for them. Because of the way many organisations measure their courses, not many wanted to take the risk of poor happy sheets. Of course the challenge of any radical innovation is that its value may not be obvious at the start. With tight budgets and pressure for immediate results, many hard-pressed clients find it easier to stick with the conventional. Two brave organisations did show interest in 2006, both governmental and both existing Ashridge clients, one of which was the FCO.

The FCO was already running a development program with Ashridge and had decided that when the new contract was negotiated it should make more use of those development centre techniques which were proving successful elsewhere in the organisation. Ashridge saw the chance to marry this brief with the FLE format, which appeared to be step in the direction that the FCO wanted to take. Andrew Millar, Team Leader, HR – RADICAL, Development and Diversity Team, and FCO owner of the program, compares the old and new offerings as ‘apples and oranges.’ He feels the new program design is more attuned to the direction the FCO is taking in the twenty first century, where its leaders are under increasing pressure to be aware of their own behavior and to have flexible and adaptable styles of leadership. “It is easier in the new form for people to understand exactly what they are taking away from the week and use that back in their jobs.” He summarises it as “in the past such programs tackled the intellect, now we are tackling the heart as well.”

In December 2006 the FCO piloted the core simulation, and the first full program took place in January 2007. Since then it has run approximately every other month.

Although the key themes of self-awareness, muscle memory and critical incidents remained the same as the Open program, the FCO added in the challenge of reducing the elapsed time and eliminating the external coaching element. They also requested that the program focus on specific areas of competence relevant to the learning group, the key pinch points for them as leaders of the future. To ensure the program’s relevance to the organisation, the team triangulated the FCO competence list with appraisal feedback and other staff data, including reasons why people succeed and fail at a certain level in the organisation. James Morrison, who spent two years at Ashridge on sabbatical from the Foreign and Commonwealth Office, interviewed a sample of senior FCO staff, using questions similar to those used to
develop the original FLE. This research emphasised two particular areas of focus – **difficult conversations** and **delivering through others**, so these were prioritised in the program design.

While the tailored design was ‘safer’ in its use of competence-based inputs before the simulation, the pay-off was that the simulation could now only be one day long. The team were concerned that this would reduce the opportunity for challenge, rebellion and overnight developments, although it would reduce the degree of coaching support needed post-program.

**Theoretical perspectives and key methodologies**

The creation of this approach to learning developed out of interview-based Ashridge research, building on existing literature on leadership. The objective was to find the optimal way both to deepen and accelerate learning for this group of potential leaders, and to bring forward in time the leadership lessons learned by those who had been through the experience in real life.

Work by the Center for Creative Leadership (CCL) (e.g. Leslie & Van Velsor (1995), Lombardo & McCauley (1988), McCall & Lombardo (1983), Van Velsor et al (2004)) indicates that the transition from middle to senior management is a career point at which many **derail**, hence it is a critical point at which career failure can be avoided. The CCL research also highlights that those qualities which help to gain promotion early on may actually cause derailment at this stage. Findings indicated that successful people demonstrate qualities of **diversity** (in career and approach), getting on with a variety of people, and managing to **focus** and stay calm under pressure. The CCL researchers proposed four main reasons for derailment – **interpersonal relationships**, **failure to meet business objectives**, **inability to lead and build a team**, and **inability to change**.

The CCL findings point to two important drivers for the development of any new program for future leaders. Firstly, it is critical that individuals understand themselves and their impact on those around them, and secondly that the key components of success at this level are largely behavioral. There are therefore strong links to the field of emotional intelligence, popularised through the work of Daniel Goleman (1998), which claims that above average leadership performance is associated with high emotional intelligence. Although these claims may not be agreed by all (Mayer 1999), the core EI concepts of self-awareness, social awareness, self management and relationship management have strong validity in performance at the senior management level.

Other contributors to the thinking of the Ashridge team included Drucker (1999) who predicted that success in the knowledge economy would come to those who know themselves – their strengths, their values and how they best perform; and Popper (1995) who argued that leadership is an emotional influence on people and suggests that “the principles that should be at the basis of leadership development are experiential learning, vicarious learning (observing others) and transformational learning in a critical period,”
(cited in Blass and Carr (2006)). Although much of this thinking was not new, it had strong resonance with the Ashridge team and the concepts were used to underpin the design of the FLE and FCO development programs.

Another key finding from the literature is that although leadership can be taught, it needs to be experienced to be authentic (e.g. McCall (2004), Thomas & Cheese (2005), Kayes, Kayes & Kolb (2005)). The Ashridge team also felt that their thinking for the new program aligned strongly with Kolb’s seminal work (1984), not just on learning styles but more especially on the learning cycle, and also from later researchers on the social aspects of learning in groups (for example, Vince 1998). Although the term ‘experiential learning’ may cover everything from learning on the job to outdoor learning exercises, the work of Kolb and others were able to help the team design a multi-faceted, classroom-based approach to experiential learning.

The Ashridge research, mentioned previously, concluded from its early interviews that critical incidents and key moments of learning/self-insight were the defining features in the development of current business leaders. Along with the ‘what I wish I had known ten years ago’ question, this formed the basis of the more extensive research across the population of 314 individuals. The key ‘critical incidents’ fell into the following broad categories: managing others, being a manager, fulfilling a management role, being managed, disciplinary issues; and, concerning individuals – self insight, where work and life meet, and developing corporate awareness. The ‘what I wish I’d known’ items fell into seven groups – power and politics, stepping outside the box, relating to others, building a career, sense of self, personal learning, and focus of energy. These two lists are interlinked and highlight the external position – the role of the individual in relation to others, as well the internal - self-knowledge, self-awareness and self-management. In the interview population there appeared to be a strong correlation between high self-awareness and success as a leader.

The research was also informed by Charles Smith’s The Merlin Factor (1994), in which Smith recalls the legend of Merlin who lived backwards in time, born in the future and ageing as he proceeded into the past, influencing events based on his knowledge of their outcome. This concept coupled with the ‘what I wish I had known ten years ago’ data provided the basis for a design which would accelerate the learning of managers on the program. According to Smith “exceptional leaders cultivate the Merlin-like habit of acting in the present moment as ambassadors of a radically different future in order to imbue their organisations with a breakthrough vision of what it is possible to achieve.”

As a term to define the objectives of the approach the team chose ‘muscle memory.’ Muscle memory in its strictest form relates to a physical phenomenon of a ‘reflex’ action brought on by repeated rehearsal or practice. However, it has been extended (for example, Fiorelli 2006) to include behavioral actions performed with minimal thought – tacitly, having gone through realistic practice or experience. ‘Critical incident muscle memory’ for leadership
behavior therefore became a core objective of the Ashridge design team.

As a result of the research the Ashridge team came to a number of key conclusions (Poole & Carr 2005): future challenges can be presented in an immediate context so the learning will be embedded in the present for use in the future; it is possible to help people identify derailment before it is too late; learning for this group needs to be real and timely; deep learning is often uncomfortable; and future leaders need to be strong and resilient as the role of a leader is extremely challenging. It was now their challenge “to ascertain whether self-awareness really is the key to leadership development” (Blass and Carr 2006), and whether the wisdom with hindsight of developed leaders, coupled with realistic experiences to develop critical incident muscle memory, could help shape a new learning intervention.

**Program description**

The FCO program is a four day residential event. The first two days involve ‘traditional’ Ashridge sessions including the learning cycle and discussions and debates on topics such as career pathing, listening, coaching and personal impact. There is also feedback from instruments such as MBTI® and 360° and the chance to practice difficult conversations. The participants form into peer learning trios which act as a support and feedback mechanism throughout the event as well as when they return to work. These trios are the ‘coaching’ mechanism for the ongoing development of the individuals to assist with the transfer of learning. The first two days allow the participants to feel comfortable in the environment and with each other before they embark on the business simulation. Some preparation work is done the evening before the main event, but the participants do not know what will happen the next day. (NB: In order to preserve the impact of the simulation for future participants the exact details of the day are not explained here).

The simulation has been designed specifically for the Foreign and Commonwealth Office, based around a business environment the participants would recognise, and including those critical incidents which are key to their learning as leaders and managers within the FCO. The aim is for the participants to increase their self-awareness, and to manage their own learning throughout the day to develop their critical incident muscle memory for the future. Although certain elements of the day are fixed, the tutor team of three is on constant alert to the mood, direction and learning occurring at any point in time and may introduce new incidents, actions or information, in order to maximise learning for individuals or the group as a whole. Some of these elements are from a ‘menu’ of effective actions, based on experience of the program, but others are spontaneous selections which support that specific group at that time. When the simulation is complete, the participants take part in a physical activity designed to help them work through their feelings after the intensity of the day’s learning.

The class size is limited to eighteen, giving each tutor a group of six participants to support. The three-person team provides a multi-
perspective view of the group as well as their observation of individuals. This allows the tutor team to balance each other as they judge the mood of the room and determine the flow of the day. The expectation is that the tutor team will model the emotional resilience of good leaders as they in turn support the FCO participants through their learning journey. To an outside observer, and often to the participants, the facilitators may appear to be taking a very passive role in the simulation, which can arouse strong emotion in those who are struggling with the concepts and behavior required. In fact, the facilitators are highly alert and focused, carefully orchestrating the events of the day and holding the learning intention throughout.

The final day starts with a debrief session about the detailed research behind the simulation to aid participants’ progression through the learning cycle, and the group reflects on their experience in plenary. The participants then offer each other peer feedback in a structured process. Meanwhile, the tutor team meet privately to review their observations of individual participants to ensure they give them rounded feedback. While participants meet their assigned tutors for 1:1 feedback, the peer learning trios meet for further discussion and to prepare their personal development plans. While the Open version of the FLE includes follow-up coaching one month and six months post-program, in this program the learning trios become the primary post-program support mechanism, meeting up over the following six months to hold each other mutually accountable, and submitting a short ‘ROI’ report at the end of that period.

**Challenges and constraints**

- **Emotional intensity** - This program is not only intense for the participants, but also for those facilitating it. The simulation often arouses high emotions which are usually directed at the facilitators, who need to be robust individuals. The participants need time and space to reflect on the feedback they have been given by their peers and the facilitators and to absorb it. Although reflection time is included during the program, the nature of the muscle memory design means that insight tends to keep coming long after the program itself has finished, and the week itself remains a very emotional experience for many participants.

- **Resources** - The program is tutor intensive, with a relatively small class and a ratio of six participants per tutor. The tutors need to be experienced, resilient, skilled and flexible. The simulation is designed in such a way that it is dynamic and its direction is monitored and altered to provide the best learning experience. Coaching is also a key element during the program and the tutors need to be skilled coaches and feedback-givers to help achieve the best results for individual participants.

- **Self-managed learning** - This type of program may not be for all individuals. Some will tackle it with enthusiasm, others may just opt out. Those who recognise that the learning is mostly self-managed and create opportunities for themselves to learn will gain most. The individuals who do not participate
or who avoid personal learning opportunities will not only lose out on their development but may also be indicating that a long-term leadership role is not for them.

- **The culture** – as with any group there will be a variety of learning approaches and needs amongst the individuals, but the overall organisational culture also plays a part. The overriding culture may subtly impact individual behavior during the program, both positively and negatively. For example, the FCO is a structured hierarchy and, relative to other groups, participants are very swift to make decisions on roles and structure. It is a challenge for the facilitators and the participants to find the right points at which to challenge cultural norms to optimise the learning experience.

### Key success factors

- **Bravery and foresight** of Eve and her original design team to launch a program that would not necessarily provide high scores on the happy sheets, and which might therefore be more challenging to sell to clients.

- **Dedicated faculty** with robust mental capabilities, belief in the program and its results, resilience, energy and enthusiasm.

- Clients with the foresight to see that such a program adds value in the **long term** and who are willing to work in partnership with the school to provide the most appropriate learning experience.

- Participants who enter into the experience with an **open mind**, combined with enthusiasm and a willingness to manage their own learning.

### Evidence of impact

A follow-up study of the impact of the program was conducted in November 2007 by Kate Charlton of Ashridge, via semi-structured interviews with a random selection of 17 participants from the first three FCO cohorts to complete the program in 2007.

One aspect that had worried the Ashridge team was the rating given immediately after the event, but through 2007 is has scored an average of 5.26 out of 6, indicating that the participants did recognise the value of the program at the point of learning. In the longer term (9-12 months after completion) highly valued aspects included the balance of different learning approaches, structured feedback and the transferability of learning from the simulation experience. The participants reported that they had an increased self-awareness and that many had changed their management style and focus. Some comments include:

"Hard work, quite draining but very real and relevant to what we do at work. A lot of the learning has come out gradually, reflecting on what I felt as we went through the exercise and coaching.”
The simulation exercise is challenging and risky but thirteen of the seventeen respondents said it was especially powerful for their learning, although four disagreed.

“The exercise was where I learned most...Seeing where I got heard and was valued and where my points got lost... was valuable learning that I could only have got from that realistic kind of role play.”

“I got less out of the simulation because it was too unstructured for me.”

More than 70% of the respondents talked spontaneously about the impact on the way they manage people. After the program there was strong evidence of more frequent and conscious delegation, improved listening and coaching skills, a move to think more strategically and far more reflection on personal impact. Andrew Millar notes that the FCO has recently completed an Investors in People review which indicates that there has been a clear improvement in a number of the leadership behaviors that were the target of the program, such as self-awareness, delegation and coaching.

“It’s made a real difference. I’m getting more out of people.”

“It’s a mutual investment in development. I can focus on the big corporate issues and the team are more confident and getting great opportunities. It’s very empowering and the team is clearly working better.”

“I was already on the journey, but it moved me from thinking like a desk officer to thinking like a leader.”

“The learning for me came afterwards – putting together all the feedback I got and then reflecting on (it).”

In terms of improvements, the major areas were on the exact timing of attendance relative to career development within Band D, and the request to do more as a follow up for the alumni of the program. The level of structure provided in the simulation remains an open debate. The peer learning trios were also a challenge; their success can depend on the drive of the members and how well they gel as a group.

94% of the interviewees felt sure the program had made a positive difference to the value they add to the FCO. One person echoed the original objective of the program:

“What I have found most helpful... is the sense that when I do things for the first time, I’m not doing them for the first time – I’ve been there before.”

**Into the future**

Program feedback continues to fuel improvements so it can be tweaked to ensure it remains highly rated by the participants and the client at the FCO. The contract is scheduled to run for three years
which will permit a sufficient level of attendance to help embed the behaviors throughout the FCO culture. Andrew Millar summarises the program as "appropriate throughout, expensive but very high impact, and that impact is our objective". Ashridge runs this tailored program for one other client, and hopes to encourage other clients to follow this brave lead.

Andrew also sees the trend towards virtual teams and virtual global networks being highly relevant to the FCO of the future, and there is an opportunity for this element to be added into the program.

As the design of the content is fairly flexible, it can be tuned to the specific client needs and is therefore a model which can be readily adapted. However, Eve Poole feels that although the approach to learning used for the Future Leaders programs was a revolutionary innovation three years ago and continues to prove its worth, she is curious to find the next new innovatory approach to leadership development, and not rest on her laurels.

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“Invented here”: Integral change at the Naval Surface Warfare Center, Corona

“"I'm convinced that the only thing that will be successful here is something that we build, that is useful to us”"
John Fishell, Division Technical Director, Naval Surface Warfare Center, Corona.

With particular thanks to Karl Johnson at Notre Dame, and Bruce Galloway and John Fishell at the Naval Surface Warfare Center, Corona Division.

Introduction

This case study describes a leadership and organizational development intervention for a division of the US Navy delivered in partnership with Notre-Dame. It was selected for the innovative use of Integral theory as the overarching framework to inform the methodologies and theories used to effect individual and whole system change. The case study also demonstrates the value of an engaged workforce in embedding change and taking ownership for their future development.

Overview

Notre Dame has worked with the Naval Surface Warfare Center - Corona division, since 2005 on leadership capability and organizational development. The work has involved three distinct phases:

Phase I: 2005 Corona Leadership Academy (CLA)
Phase II: 2006 Whole-system Executive Leadership Development (WELD)
Phase III: 2006-8 Employee Development Program (EDP)

Phase I, the Corona Leadership Academy (CLA) essentially acted as a springboard for later work. Its purpose was to cascade leadership development through the organization in a way that created a shared understanding and discourse. It touched all employees at Corona to some extent, though the emphasis was on leadership development for middle to senior managers.

Phase II, the Whole-system Executive Leadership Development (WELD) initiative, involved a range of means to promote individual and organizational development, including individual assessment and coaching, workgroup activity and expert input, culminating in a large scale event in May 2006. Three methodologies underpinned most of
this work, Action, Reflection, Learning, Real-time Strategic Change and Polarieties Management.

Phase III, the Employee Development Program (EDP) emerged out of the activities begun during phase II. The focus is on facilitated workgroup activity, coupled with expert input as required. The EDP continues into 2008, with workgroups rolling out the employee development systems they have designed, identifying and requesting further development as required.

At the start of the relationship between Corona and Notre Dame in 2005, the program of activity had not been mapped out beyond an initial design. This was intended to equip employees at Corona to define their needs as these emerged and commit to working on them, with the support and expertise of the Notre Dame team.

The blend of consulting, executive education, coaching, action learning, strategy definition and refinement, assessment and large scale change events that resulted was held together by an overarching appreciation for the interdependencies between these components as described by Integral theory.

Origin and rationale

In Spring 2005, John Fishell, Division Technical Director for the Naval Surface Warfare Center – Corona Division, and the commanding officer of the Division, Captain Stephen Miller, commissioned a team from Notre Dame University, led by Karl Johnson, to help them with leadership development, career and succession planning for the Division, underpinned by culture change.

Corona faced a high percentage of retirees from its executive ranks, up to 40% within five years: long-standing, experienced and skilled members of the workforce. In addition, the Division had recruited rapidly in preceding years, bringing 600 new staff onboard, representing a diverse cross-section of ethnicities and cultures, into an organization with a total of only 1,100 employees. Senior management realised that the Division could not simply wait for these new employees to learn the ropes purely through the experience of being in the organization.

John and Captain Stephen Miller wanted to harness the organizational wisdom and culture residing with existing employees through the inevitable cultural shift that would take place given these massive changes in workforce dynamics. Additionally, John wanted to “embed business sense and knowledge and understanding into the management structure.

“Our approach in the past has been to bring training classes in. Trainers go away and then it’s business as usual…You end up with people armed with the knowledge, and no real embedded application…The beginning of this was to try to do something different.

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4 See various websites, e.g. www.integralinstitute.org and www.integralworld.net for latest updates on theory and application of Integral theory
“We’ve got a business of 1,000 highly technical people, predominantly engineers and scientists, plus another 1,000 contractors. No one with a business degree, and I’m running a business of $200M”.

Theoretical perspectives and key methodologies

Integral theory

**Integral Theory**, developed by philosopher **Ken Wilber** (e.g. 1977, 1997, 2000) underpins Notre Dame’s work with Corona and with other clients. The theory emphasises the importance of paying attention to the individual and collective, the interior and exterior, and the interrelationship between these dimensions:

Fig. 21: Ken Wilber’s Integral Model

Integral Quadrants

<table>
<thead>
<tr>
<th>Individual Interior (subjective)</th>
<th>Consciousness: Values, Motivations, IQ/EQ</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collective Interior (intersubjective)</td>
<td>Cultural: Unspoken norms, Understood protocol</td>
</tr>
<tr>
<td>Individual Exterior (objective)</td>
<td>Behavior: Observable actions, Language</td>
</tr>
<tr>
<td>Collective Exterior (interobjective)</td>
<td>Systems: Governance: Democratic, Socialist, Feudal, Ethnic</td>
</tr>
<tr>
<td></td>
<td>Business: Financial, Marketing, Supply/Dist, Ops</td>
</tr>
<tr>
<td></td>
<td>Technology: Mechanical, Electrical, Network/Information</td>
</tr>
</tbody>
</table>

Wilber suggests that over the course of modern\(^5\) history the prevalent focus of leaders and cultures has been on the collective exterior, with some recognition of behaviors in the individual exterior. Wilber believes that this emphasis on systems to achieve progress continues to dominate the way in which leaders operate today. The presumption is that behavioral and systemic change can be effected through focusing on the tangible and externally visible. Wilber argues that this approach has limitations through neglect of the interior dimensions of consciousness (individual interior) and culture (collective interior).

The Integral approach is non-linear and requires work at the individual, organization and systems level to support change. It is non-prescriptive in terms of specific methodologies, and is held as an overarching principle for organising activities to support change.

An Integral approach to leadership and organizational change focuses on all four quadrants, putting greatest emphasis on the individual

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\(^5\) Karl Johnson points out that in earlier western history and, for instance, in current tribal culture, the individual and collective interior is well explored and leveraged.
interior, consciousness. The premise is that an individual’s values, motivations and IQ/EQ determines how (s)he interprets and acts in relation to the other three quadrants: behavior, systems and culture. Wilber argues that the most promising route to sustained organizational change must involve a shift in the consciousness of individual leaders.

Developmental psychologists Jane Loevinger e.g. 1966, 1976), Susanne Cook-Greuter (2004) and Robert Kegan (1994) have described consciousness as being developed horizontally and vertically. They suggest that most training and development is in the horizontal plane – learners are enriched within their current way of thinking, learning new skills and behaviors that widen the resources available to them.

At Corona, **horizontal development** included up-skilling in areas of deficiency as identified by the client – leadership, ethics, management and finance.

According to Loevinger, Cook-Greuter and Kegan, **vertical development** happens in steps and changes individuals’ interpretations of experience and their views on reality. In the Integral model, this represents change within the consciousness (individual interior) quadrant. With each step up the ladder of vertical development, individuals acquire greater awareness and capacity to pay attention to information, and consequently, as leaders, they can integrate and influence more.

At Corona, great emphasis was placed on vertical development, and on assessing the relative vertical development of individual leaders, introducing developmental exercises as appropriate.

Seen through an Integral lens, the work at Corona was designed to develop consciousness (individual interior) and culture (collective interior), promoting vertical development at an individual and organizational level. At the same time, the approach was intended to engage individuals in the organizational change effort in order to underpin its success.

**Real-time Strategic Change**

During the first year of work with Corona, it became clear that systems to support employee development were missing. Rather than outsource to experts, the design team were keen that employees would themselves design and deliver appropriate systems. The intent was to foster engagement and learning throughout all four Integral quadrants so that the systems would be accepted and endorsed by their ultimate users, and were the best possible to match Corona’s needs.

Robert “Jake” Jacobs’ **Real-time Strategic Change** (RTSC) methodology (1994) was selected to facilitate the system design process. Jacobs’ work builds on whole-system change interventions first deployed at Ford in the early 1980s. He has refined his approach into a principles-based methodology that complements the Integral
model and scales easily from small to large group settings, e.g. action learning sets through to Large Scale Events.

The six RTSC principles were deployed across the different activities during Phases II and III, the Whole-system Executive Leadership Development (WELD) initiative and Employee Development Program (EDP). The principles informed the initial strategic discussions with the senior leadership team, the definition of workgroup objectives and selection of their participants, the facilitation of the various workgroups, and the design and selection of participants for the culminating large-scale event.

**Polarity Management**

The concept of Polarity Management was first articulated by Dr. Barry Johnson in 1975 and has since been developed and applied in a range of industries and sectors.

Polarities are interdependent opposites which function best when both are present to balance with each other\(^6\). Common examples would include: Individual and Team, Clarity and Flexibility, Planning and Action, Stability and Change, Action and Reflection.

Polarity Management is a way of conceptualising challenges as polarities to manage, rather than problems to solve. It involves moving from a focus on one pole as the problem and the other as the solution, to valuing both poles. When applied effectively, polarity management gets the best of both poles whilst avoiding the downsides of over focusing on either one.

A polarity map identifies the upsides and downsides of each pole, resulting in a whole picture of the polarity to be managed. The diagram below is an example of a polarity map:

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\(^6\) Definition taken from Dr. Michael Welp from EqualVoice
http://www.equalvoice.com/polarity_map_wrksht.pdf
In the Corona-Notre Dame partnership, the theories of Integral, Real Time Strategic Change and Polarities Management are brought together in the delivery of the initiative.

**Action, Reflection, and Learning**

Workgroup activity comprised an important component of Phases II and III, the WELD and EDP efforts. Workgroups were conceived as both a leadership development activity for participants and as a practical component of a change initiative focused on creating systems for employee development.

Workgroups were facilitated based on the action learning principles articulated by Reginald Revans in the 1950s. Facilitators needed to be skilled in order to judge when to intervene and when to provide or seek expert knowledge. It was the facilitators’ responsibility to promote participants’ horizontal development, e.g. providing expert knowledge in how to form and charter a workgroup.

Facilitators also needed to balance participants’ action orientation with time for reflection in order to encourage them to stop the work at hand, regain a strategic perspective, reflect on their individual and collective learning, and apply that learning to their next actions. This gave rise to vertical development through encouraging new perspectives and mindsets.

The design team describe this cyclic process as **Action, Reflection, and Learning**.
360° assessments

In Integral terms, 360° assessments can be described as a way of codifying leadership behaviors observed in the upper right Integral quadrant (individual exterior). Using these indicators, coaches worked with leaders to explore the interior dimensions of consciousness that underlie their visible behaviors. Two assessment tools were used, described below:

**Leadership Circle Profile**

The Leadership Circle Profile, designed by Bob Anderson, has 36 leadership dimensions, each of which is either “creative” or “reactive”. Later stage leadership attributes are described as “creative”, whilst earlier stages are “reactive”. As such, the 360° assessment and associated coaching were explicitly linked with the intent to promote awareness of later stage developmental attributes as a means of fostering vertical development. Approximately 200 leaders at Corona took the assessment and received coaching.

**Leadership Development Profile**

The Leadership Development Profile measures an individual’s stage of vertical development. It is thought that Notre Dame is the first executive education provider to use the tool.

The tool is based on the work of Jane Loevinger (e.g. 1966, 1976) and other developmental psychologists who, in the 1970s, began measuring stages of ego development using the Washington University Sentence Completion Test. They found they could measure an individual’s stage of ego development by analysing the content and structure of the endings that these individuals gave to incomplete sentences.

Susan Cook-Greuter (2004) later added to the research in recognising later stages of ego development with the tool, and modified it to use in a business context.

(See Torbert & Rooke’s April 2005 Harvard Business Review article, *Seven Transformations of Leadership*).
Program description

Phase I: 2005 Corona Leadership Academy

The early stage of engagement between Corona and Notre Dame took the form of the Corona Leadership Academy (CLA). Whilst fairly conventional, Notre Dame considered the CLA an appropriate starting point in terms of introducing leadership development tools and concepts new to Corona – namely 360° assessment, coaching and an on-line component - whilst providing a level of safety through the delivery of a tightly defined program, including standard skills-building elements. Four aspirations characterized the program, tailored to the levels within the organization:

- Contribute Leadership and Strategic Insights – the Captain and Division Technical Director
- Grow Strategic Leadership Skills – 27 members of the Executive Steering Group
- Build Communication and Leadership Skills – 74 Division and Branch Heads
- Strengthen Shared Organizational Culture – remaining 847 workforce members.

These themes were delivered through the following mechanisms over a 12-month period from Spring 2005:

Initially, the 360° assessments and coaching were only intended for the top level executives, mainly command staff and department heads, but strong participant feedback led to the provision being

Fig. 23: Phase I: Corona Leadership Academy design
extended to the next two levels within the organization: division and branch heads.

**Phase II: 2006 Whole-system Executive Leadership Development Initiative**

Following the laying down of foundations during the 2005 Corona Leadership Academy (CLA) program, the Corona Whole-system Executive Leadership Development (WELD) initiative was launched in 2006. WELD took the Integral model as the overarching design framework into which a range of methodologies for leadership development and organizational transformation were integrated.

These are illustrated below, with the principles, the means for engaging with these principles and the methodologies used, categorised into the four Integral quadrants:

**Fig. 24: Phase II mapped onto Integral model**

As with the CLA, the WELD initiative reached all levels of management at Corona, with different activities being delivered at different levels within the organization.

**Strategic visioning**

The WELD initiative began with facilitated strategic visioning meetings, the output of which was a document outlining “Strategic Thrust Areas” for Corona, and including a list of organization-wide leadership competencies necessary for achieving success in each
area. A second output of the meetings was a Leadership Structure Team (~ described below).

**Assessment and coaching**

The two primary means for stimulating leaders’ vertical and horizontal development within the consciousness (individual interior) quadrant were **assessment** and **executive coaching**. Two 360° tools were used in the assessment element, the **Leadership Circle Profile** and **Leadership Development Profile** described above. Primarily, these were used for individuals to gauge their own development needs, working with an executive coach.

The Leadership Development Profile was used for two further purposes, the information being volunteered by individuals:

1. to inform conversations around succession planning and career development, providing data to complement the potentially subjective views of the Executive Steering Group
2. to inform composition of workgroups, both from the perspective of the developmental needs of the individual and the best mix of competencies for the group.

John Fishell, Division Technical Director, commented on the difference in approach to using 360° assessments in comparison with the way they had been used at Corona in the past:

“The important piece is the one-on-one third party counselling. Your supervisor is not embedded. In the past if it you did a 360 review, they’d put the results between you and your supervisors and discuss where you were lacking. This way it’s theirs personally and I’ve noticed over time they’re starting to share it with others, with their peers, the leadership”.

Work in the consciousness (individual interior) quadrant was complemented by work in the remaining three quadrants of the Integral model (individual exterior, collective exterior, collective interior). Two predominant methodologies were used to promote individual and organizational learning, and development of systemic thinking capability: **Real-time Strategic Change (RTSC)** and **Action, Reflection and Learning**. These methodologies underpinned the way in which workgroups and the large scale event were facilitated.

**Workgroup activity**

Workgroups were at the heart of activities during Phase II, the WELD initiative. Candidates for workgroups were chosen based on the perceived benefits the experience would provide them with as a platform for leadership development, while each workgroup team was of “max-mix” composition to ensure dialogue and interaction across functions, levels of hierarchy and job roles.

Four teams were formed to address specific facets of leadership development at Corona with a fifth team focused on strategic leadership decision-making. These teams were formed and operated with the guidance of Notre Dame, using the principles of Real-Time
Strategic Change and Action, Reflection, Learning. Each was facilitated and coached over a three month period in spring 2006.

Karl Johnson, Notre Dame: “We are essentially consulting them in facilitating these teams to develop their own solutions to these problems.”

Competency Workgroup

The competency workgroup had responsibility for describing the leadership competencies necessary for each level of leadership within Corona. They conducted 360° reviews of each position through interviews with those above, at, and below the position, and across the organization’s six departments. Results for each position were aggregated, discussed, and a list of leadership competencies drafted. These competencies were then presented, discussed, and refined with Corona’s top 180 leaders during the subsequent large scale event.

Career Planning Workgroup

The Career Planning Workgroup focused on producing a clear career map, using one of Corona’s departments as a case study and pilot. The pilot map illustrates career levels within the department’s divisions, potential lateral and diagonal career moves and clear career paths against which employees can map their career aspirations.

The group also identified Individual Development Plans (IDPs) as a crucial means of facilitating and documenting career development conversations between employees and their managers. IDPs had historically only been used for new employees and new supervisors, and lapsed when the probationary period came to an end. The workgroup developed a guide for managing career planning conversations. New IDPs were designed and deployed in December 2006. Within six months of introducing the process, supported by extensive training and workshops, 98% of all employees had and were using an IDP. Bruce Galloway comments, “This achievement once again signified the commitment employees have to their own individual development and was the first tangible success of the EDP”.

Training Systems Workgroup

The Training Systems Workgroup looked at current training systems provision at Corona to support needs assessment, training course design and selection. They documented the results and this work was a major driver of the decision by senior management to create a new role, Employee Development Program Manager.

Succession Planning Workgroup

The Succession Planning Workgroup identified ‘A Positions’ at Corona, i.e. those of crucial importance to the organization, likely to be vacated through retirement or promotion within the next 3-5 years, and representing developmental opportunities for the next generation of leaders at the base.
Leadership Structure Team

The Leadership Structure Team investigated alternative means of facilitating strategic versus operational decision-making at Corona and proposed a new leadership system at Corona.

Large Scale Event

All five workgroups shared their outputs at a large-scale event in May 2006 that included 180 of Corona’s leaders. From an Integral perspective, the large scale event addressed the importance of modelling new leadership behaviors (individual exterior) by the participation of the Executive Steering Group in an inclusive and flexible event at which collective decisions were made in real-time (collective exterior).

The event also provided an opportunity to get a critical mass of people together who would be responsible for implementing the workgroups’ recommendations. The purpose was to engage them through collectively discussing, understanding and refining the recommendations (collective interior).

In summary, the WELD initiative looked like this (assessment and coaching not shown):

![WELD Design](image-url)

Fig. 25: WELD initiative overview
**Phase III: Employee Development Program (EDP), 2006 – 8+**

The work accomplished by workgroups during the 2006 WELD initiative formed the basis of the third phase of work entitled the Employee Development Program (EDP). Corona re-branded the initiative as it was clear that executive leadership - where the program of work had started - was only one component of the work going on, and its intent. A new internal position, Project Manager for Employee Development Systems, was created after the 2006 WELD large scale event in recognition of the importance of this work. Project Manager, Bruce Galloway, serves as an internal consultant responsible for guidance and integration of current and future work in EDP.

Once Bruce had got established in his new position at Corona, workgroups re-grouped to continue the work started during WELD. A series of “all-hands briefings” were critical in gaining endorsement from employees. At each briefing, the rationale, progress to date and future direction were explained and at the end a “call-to-arms” secured over 60 volunteers who publicly committed to taking initiative forward.

Competency, Training Systems, Succession Planning, and Career Development workgroups were re-established with new members. The Leadership Structure initiative was deemed complete and, instead, an Integration Team was formed to maintain focus on the interdependencies and connections between the different workgroup efforts. This part of the EDP initiative, like WELD before it, culminated in a large scale event in August 2007.

Phase III continues under Project Manager Bruce Galloway’s co-ordination, with workgroups further developing and implementing their systems for employee development, supported by the Notre Dame team (see Into the Future below). It is anticipated that the continuation of the EDP will culminate in a third large scale event in 2008.

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**Fig. 26: WELD and EDP overview**
Challenges and constraints

- **Facilitating an emergent design.** Karl Johnson, Notre Dame: "Building the bridge as you walk on it. Designing as you deploy has the same challenges whenever you do it. There has to be flexibility, a willingness to hold ambiguity for a time”.

- **Investing wisely.** John Fishell, Division Technical Director, Corona: “Money is always a constraint”. From Corona’s perspective, balancing the desire for the best possible development intervention with the costs, both externally in terms of paying for facilitators, consultants etc., and internally in terms of the time and resources attributed to the program of activity. At least in part, this has been managed by both organizations aspiring towards a situation where Corona is independent of Notre Dame, whilst maintaining recognition of the importance of employee development.

- **Securing top to bottom buy-in.** John Fishell: “Getting the commitment of senior leaders to go down this road…I spent a lot of time personally with senior leadership …Then it was bringing the workforce on board, showing them what it would mean to them, where we wanted to go with it”. Program Manager Bruce Galloway reiterates this, explaining that the biggest challenge initially was in getting a critical mass of employees to take on the extra duties the development initiatives required.

Key success factors

- **Credit for involvement.** Employees were given credit for time spent on WELD, and now EDP, activity, in the same way as they bill hours towards client projects. This formal recognition that internal development is as important as external project work sends a strong message about what is valued in the organization, and legitimises (thus freeing up) time for employees to work on their workgroup activities.

- **Top level champion and dedicated resource.** John Fishell, a strong and visible advocate for Notre Dame’s work with Corona, holds a top executive position and, importantly, is highly regarded by peers and staff, commanding great respect and influence in the organization. Bruce Galloway was appointed as Project Manager for Employee Development at the end of the first phase of work, and having him as a dedicated internal resource has been critical to sustaining momentum and employee engagement.

- **Outcome-focused mindset.** Most employees at Corona are engineers whose work is strongly outcome-focused, with defined timescales. When applied to the ‘soft’ development of the WELD and EDP initiatives, this “can do” attitude is a great asset for the workgroup teams and large scale event design team in getting things done.
Top-to-bottom engagement. The flip-side of the challenge in getting buy-in from the most senior to the most junior staff is that as engagement grew and commitment to the initiative strengthened, its impact and embeddedness have also grown. John Fishell gives his view:

“Particularly when you want to do it this way, engage...a lot of people...I’ve got confidence in the process we’re going through, and my confidence is growing rapidly in the acceptance. That’s what’ll make it happen – people will take it as their own, and I’m starting to see that. These people are engaged...Everyone is engaged, putting ideas out.

“Management is too embedded and invested in it to leave. We put department heads to lead our early teams, so we got buy-in to the early cycles...In the early beginnings of it we had several department heads and senior people involved in the crafting. So they had ownership, and were also coming up in helping to modify and have a vision of where we want to go”.

Evidence of impact

The employee development systems crafted by the workgroups are clear outputs that have resulted as a direct consequence of the work between Corona and Notre Dame. In addition to these tangible systems, processes, databases and so on, John Fishell comments on having noticed that the initiatives have resulted in application of learning, including changes in behavior:

“We’re embedding the knowledge along with the development. I can see a definitive change in the organization because of the process we’re using versus just bringing trainers in who teach something and leave...You start seeing application...there are incremental changes and we’re embedding it throughout the organization. Everyone is behaving differently, more effectively.”

The organization has recently created a revised strategic plan. To turn that plan into reality, it is using the approach of having ‘max-mix’ teams participating in creating and executing the tactics behind the strategies. The teams were formed after a presentation of the strategic plan was unveiled to over 600 employees in an ‘all-hands’ event. At the conclusion of the presentation, the employees were invited to volunteer to participate on one or more of the teams. Over 120 employees volunteered. The teams were assembled into ‘max-mix’ groupings and individuals were placed in leadership roles to foster their own development. Bruce Galloway comments that, “this approach reflects the internalization of RTSC principles in the behavior and culture of the organization”.

In addition to individual managers at Corona and the organization at large, a key beneficiary of the initiatives has been the training office. Since the introduction of the Individual Development Plans, there has been “a flood of data”, as Bruce Galloway describes it, to inform the training office of development requirements.
As yet there have been no attempts to evaluate the initiatives beyond feedback sheets after workshops and the large scale events (LSEs). Upon completion of the most recent LSE, evaluation forms given to participants were returned by 146 of the 180 attendees. Participants were asked to rate their level of confidence that the change initiatives described, discussed, and recommended during the event would be implemented at Corona. Their average confidence rating on a scale of 1-10, with 10 highest, was 8.

Moving forward into 2008, a survey is being developed to gauge employee satisfaction with the career development opportunities available, and a team is looking for external benchmarks in the area of competency-based Employee Development Programs.

Tweaks are made to the program of activity on an ongoing basis. Karl explains that “We expect change in each Integral domain and will measure internal dimensions through employee surveys and expect to track aggregate, positive movement on 360 and LDP results when we cycle back and do those again. In the external integral realms, impact has manifest as the IDP launch, leaders bubbling up through their contributions on the various teams and being recognized and promoted as high-potentials..., and an online employee development tool...for every position grade within the organization.”

Beyond continuing to renew the contract for successive phases of work with Notre Dame, the creation of the internal Project Manager for Employee Development post in 2006 is testament to the value placed by the Executive Steering Group on staff development.

**Into the future**

The expectation is that the EDP initiative will continue with Phase III workgroups focusing on integration and refinement of the preceding workgroup products and recommendations using the principle of Polarity Management. Project Manager, Bruce Galloway, explains that the initiative is shifting towards a more directive pole, having been in the earlier phases focused largely on “extensive autonomous employee participation”.

In Phase IV workgroups will facilitate deployment of the systems designed and tested through Phases I, II, and III. All systems are expected to be on-line, running and linked together by spring 2008 in a “fully integrated EDP”. At that point, Karl Johnson anticipates that Corona will have reached a stage of maturity and independence from Notre Dame, “We’ll become more of a conventional provider of 2 and 3-day programs. All of their systems will tell them what we need to deliver!”

John Fishell intends to continue to progress the EDP for the foreseeable future: “We have a vision of an end state. An entire employee development system...It’s a vision of a person who hires in here who’d be able to see career paths to follow, things they can do, experiences they can have, training resources that would be available. It’s very ambitious, it will take years”.
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An environment of innovation: the BI Norway story

With special thanks to Glenn Ruud, Steinar Bjarveteit, Evy Eriksen and Rolv Petter Amdam of BI Norwegian School of Management, as well as Åge Petter Christiansen, for their time and insights.

“There has never been a committee to do innovation here at BI. It emerges from the activities we do inside and outside BI – we harvest from those environments”.

Glenn Ruud

Introduction

This case study describes both the underlying innovative culture of the BI Norwegian School of Management and a novel series of programs which use the thoughts and words of historical figures as a foundation for modern leadership practice. The programs are based on ‘cities’ courses run by a cross-disciplinary faculty team which take participants to specific locations such as Rome, Troy, Florence or England to understand the beliefs and thoughts of key people in history including Machiavelli, Dante and Elizabeth I, and how they relate to successful leadership in today’s business world.

Background and Program overview

BI was established in 1943 as a privately-funded educational institution, a markedly different approach to the typical Norwegian government-controlled free-education-for-all model. Therefore right from its inception, its survival has been dependent on meeting the needs of the business market. This culture has driven entrepreneurship and innovation at BI throughout its sixty five year history. Even today, as one of the largest business schools in Europe, run on a not-for-profit basis, about 80% of the income comes directly from tuition fees, with 10% from research and only 10% from the government.

Glenn Ruud, Director of Studies of Executive Programs says “allowing an individual or group of people to just ‘go do it’ is our culture. There are many faculty cowboys here and as long as they make a success of what they do, they are given the freedom to do it.”

‘Faculty cowboy-mentality’ is one of the reasons BI was the first foreign business school in China at Fudan University in Shanghai in 1996, where it offered a Master of Management academic qualification (since 2003 offered as an MBA), and why it has exported a similar model to other countries such as Lithuania and Australia. Other new ideas such as an Executive Program in Energy Management, launched in 2006, came about because of a long-standing client relationship, combined with the capabilities at BI and its partners in Paris, ESCP-EAP and IFP.
Glenn sums up the conditions for innovation at BI as being "first of all a belief that it is possible to create something new. Then a mixture of being in the right place at the right time, personal relationships, coincidences and finally structuring the solution to be a success".

The Associate Dean of Executive Education, Rolv Petter Amdam, adds that back in time BI was always seen as the number two school in Norway, and that drove them to move ahead. "Today I would say BI and Bergen are both number one, in different ways. Now we can use that number two feeling to drive ourselves to be more of a success in Europe." He also adds that although full-time faculty are required to have specific academic qualifications to meet government requirements, the innovative reputation of the school attracts both academic and administrative staff who fit the culture, so creating a virtuous circle. The school’s business focus means that about 25% of the people who teach at BI are associates whose core employment is often as external consultants. This approach brings in fresh ideas and current practical business experience.

Two such Associates are Steinar Bjartveit and his colleague Kjetil Eikeset. Bjartveit is a psychologist, Eikeset is an economist, philosopher and currently completing his degree as a psychologist from University of Oslo. About ten years ago they developed a concept of using classical literature and academic texts, explored in the physical ‘home’ of that text to create a strong experiential learning opportunity around leadership and management. These so-called ‘cities’ courses have been adapted to the Open programs offered by BI as part of the Masters of Management.

One characteristic of the Norwegian approach to learning is a strong desire from individuals to have a qualification and hence the emphasis at BI has, until recently, been almost exclusively focused towards qualification-earning learning at all levels. Most of the programs are also open programs, rather than those tailored to specific organizations, although the latter is a growth area of business for the school. This landscape differs from the general pattern in business schools, where, apart from MBA programs, the focus is increasingly on non-qualification tailored offerings (Gilkes 2007).

The Masters of Management program fits the BI open qualification model and was an innovation itself at the time, created following research which indicated that a very flexible, points-earning program was needed in the Norwegian market. It is a part-time post-experience qualification and consists of 3 programs (depending on prior qualifications), each of 5 modules totalling 150 hours of learning. The elements can be taken as stand-alone open programs and the final qualification is not the aim of the majority of students. Of the 13,000 students who has taken one program, only about 3000 so far has moved beyond to complete the full qualification. There is a portfolio of about 50 individual courses, of which about 35 are highly active. This menu approach allows BI the flexibility to add or delete courses based on market need; for example ‘e-business’ was a recent addition. The flexible design ensures the participants are able to tailor the program to meet their individual learning requirements. A further advantage is that a wider range of pedagogic approaches to executive
development can be taken; the courses such as those run by Bjartveit and Eikeset are able to provide a different perspective compared to the traditionally delivered options such as project management and strategic management.

**Program origin and rationale**

In the mid-1990s Steinar Bjartveit and Kjetil Eikeset were looking for better ways to approach management development, initially as part of a commercial consultancy, but later to be incorporated into the offerings at BI. They came from a background of psychology and philosophy, and this prior experience laid the foundation for both their approach and the final solution.

They started by exploring ‘solid academic theory’ that was suitable for management development and found that much older texts – both academic and those from popular literature - provided powerful messages that they believed were as appropriate as those from modern-day management gurus.

“We found that typical modern literature in management schools is interesting but it is dry and short-lived. We also feel that the academic fields such as psychology and philosophy have enormously strong theoretical models in themselves which are relevant to management study, and we decided to go back to constructivism, conflict theory from sociology, existentialism from philosophy, psychological therapy and such like,” Steinar Bjartveit comments.

As their inspiration, Bjartveit and Eikeset started with twentieth century books on modern communications theory based on psychological therapy from researchers such as Paul Watzlawick (1967, 1974) and John Weakland (1974) of the Palo Alto Group. In addition they reviewed the work of social constructivists such as Peter Berger and Thomas Luckmann (1966), whose research in the social sciences on complexity theory, reality, society and the construction of knowledge appeared applicable to leadership development in the current organizational environment.

They also went much further back in history, searching out appropriate texts which they felt contained messages for modern leaders. One of the first they explored was Machiavelli’s ‘Il Principe’ (1908). Bjartveit comments, “In my opinion it is the best text written about power and management. But it has more. Modern management texts are based on the premise that human nature is good and that we all strive for the common good. We talk about ‘empowerment’ and ‘moderation’. Machiavelli’s view on human nature is contradictory to this idea. We ended up with a principle that covered something that everyone knows but nobody dares talk about.”

From the foundation of the initial core texts and perspectives of their authors the team developed course outlines as well as a pedagogical approach that moved away from the traditional case study. The aim was to take participants out into the real locations of key authors and have them experience leadership through tasks that used power, influence and political landscapes.
Theoretical perspectives and informing principles

Core foundations

Chaos theory and the current theories of successful leadership highlight the complexity of reality, particularly in today’s fast-paced business world. Although management development is peppered with models, processes and recommendations on ‘how to succeed...’, rules and structure alone will not create leading edge businesses. Leaders have to find the right balance between bureaucracy and chaos (Brown & Eisenhardt 1998). Mintzberg (1994) labelled strategic thinking in organizations as overly structured and constricted and famously stated that traditional MBA teaching was inappropriate and fuelling poor business thinking (2004). Stacey (2003) states that traditional management theories are based upon an ordered and predictable world, which Steinar Bjartveit (2005) argues also supplies the traditional and therefore inappropriate consultant’s toolkit of 2x2 matrices and models.

Modern teaching on consultancy practice and leadership does acknowledge that the world is in a state of continuous change, and it is a phrase that is in turn widely used by consultants in their work with clients. The Red Queen Effect (Ridley 1993) illustrates this point – the faster Alice and the Queen ran, the faster the landscape moved. A stable, predictable world does not describe reality for today’s leaders, nor is there a simple model which can describe how to remain competitive in this environment. Rather like the butterfly effect (Lorenz 1993), cause and effect are not linked in a close linear relationship; it is far more complex and unpredictable than that. Therefore Bjartveit argues that ultimately communication and influence are more important than any traditional models and theories in management development; it was these thoughts that drove them to redesign how topics such as consultancy and leadership were taught in business schools.

"The vision described in management literature is of everyone coming together to rally around the strategic goals is just the pipedream of every business school graduate. We are individualistic, self-interested beings living in an unstable environment."

Steinar Bjartveit (2005)

Although there are a number of different topics which Bjartveit and Eikeset use to illustrate approaches to successful leadership, the writings of Machiavelli serve as a typical example. Machiavelli explores the inherent nature of humans and what he calls Fortuna – the area of partial stability between order and chaos. He claims that leaders place too much faith in the goddess Fortuna. In ‘Il Principe/The Prince’ he portrays the Prince as an innovator, who aims to acquire great power, and wants to carve his own way, rather than follow tradition. He therefore causes instability in the system and essentially invokes Fortuna.

He argues three points:
- A leader should be measured by his deeds
• Leaders must adapt to the situation – the equivalent of modern ‘situational leadership’
• The leader must control Fortuna through order, rules and wisdom.

The most important quality of a leader according to Machiavelli is ‘virtu’, but he adds a caveat. Reality and what is displayed in the public arena are not the same; he notes that leaders often get what they want, so that verita effetuale (efficient truth) in his words, is the manifestation of leaders’ ideas.

Machiavelli sees virtue as having components of the traits of both force (animal) and law (human) - represented by the lion which attacks Fortuna quickly and effectively and the fox with its wiliness to outsmart Fortuna. These traits are applicable to those shown by memorable leaders throughout history. He discusses courage and self-belief in leaders, conviction and decisiveness (which link to modern discussions on leaders vs. managers e.g. Zaleznik 1977 and transformational vs. transactional leaders, Bass 1998). Machiavelli asserts that it is important to shape your world rather than let it shape you, a valid discussion relating to chaos and complexity theory in business (Brown & Eisenhardt 1998, Marion 1999, Stacey 2003). He describes what is more recently known as the ‘Machiavellian hypothesis’ – the linking of the need to manipulate others with the development of complex higher order human thinking (Whiten and Byrne 1997) and the success of influence through informal rather than formal channels (Dunbar 1996).

Hence Bjartveit postulates that advice intended for princes 500 years ago has as much relevance today as it did when it was written, and that Machiavelli’s desire to show things as they are rather than as they appear is firmly grounded in the real world, a perspective is one that is of immense use to today’s leaders. Similar thinking underpins the works of other classical authors used in these programs at BI.

**Pedagogic model**

Although the core of each of the programs is based upon classical perspectives applied to modern management, the aim is to provide a rounded learning experience, which is described as having three interlinked components.
The modern perspectives are included in order to provide a link or contrast to the classical perspectives, and they are drawn mainly from the core models and theories of the fields of psychology, sociology and philosophy, as well as some modern business management theories. The third corner is the pedagogic approach, which for these programs is highly experiential and discursive. It makes use of learning in the physical environment as well as simulations, and focuses on deep discussions of the application of the ideas and learning experiences to the participants’ own working world and personal challenges.

The design of each of these programs is an intensive activity which may take up to three years to complete. There is a considerable amount of research required to provide the foundation for the topic in all three sections of the triangle, and to locate the most appropriate examples. The result also needs to be structured in such a way that the participants are able to focus on the application of the learning, rather than an intensive information gathering and understanding of complex writings, often in archaic language. The participants are not expected to have read the background texts in advance. The tutors act as ‘translators’, pulling out the relevant content and putting it in an appropriate context for discussion. Bjartveit comments on their translation approach, “Of course some academics will say that this approach makes the course too ‘lite’, but we think there is enough of an academic challenge in the way we do it.”
Program description

Structure and content

Currently there are five ‘perspectives of management’ programs at BI covering topics such as Consultancy, Leadership, and Executive Power, some of which are part of the Master of Management and others which can be taken as stand-alone courses. The on-site ‘cities’ modules are in the same seminar format as other modules in a program and include lectures, groupwork, problem-solving, simulations and discussions. Each seminar lasts three to five days.

The Consultancy program, for example, is structured as below:

Consultancy outline

1st course Module - Consultation; basic elements
2nd course module - Diagnoses and methods, challenging the consultancy business
3rd course module - Intervention strategies
4th course module - Coaching: consultant/client - a therapeutic relationship
5th course module - Consulting in an international perspective / Study tour to Venezia

The underlying authors explored include Machiavelli, Goethe, Dante and Shakespeare, each with a different link to modern business. “The Dialogues”, Socrates’ attack on the Sophists, is used as an analogy to an attack on modern business consultants. Dante’s journey is used in the context of transformational management, and there is a discussion on Iago in Shakespeare’s Othello in the role of a ‘consultant’. “What we teach them throughout is that these differing views are not truths, they are only perspectives,” says Bjartveit, “and when we discuss interventions for example we tell them that they can see the world through colored glasses, or they can see the contradictory perspectives and each of their values – from Machiavelli to social constructivism, to Goethe and complexity theory”.

The course uses Venice as the best example to illustrate the points. The city founded a trading empire lasting 1000 years, yet from a modern management perspective did everything wrong; it was too bureaucratic and there was a lack of control. By weaving in modern ideas such as complexity theory and the work on social identity by Alexander Haslam (2004), along with an understanding of key beliefs from the classical texts, the achievements of the Venetian empire make more sense. There is a business simulation in this course designed around the Machiavellian principles of power. It is based on a large ‘war map’ game board of Italy, with the players acting as the major forces of the time: Venice, Florence, Spain and France, each with historically accurate relative strength and abilities. Steinar Bjartveit comments that, “the skills of individual players will influence the ultimate winner, but often the result is the same as happened in history, and it provides a powerful learning experience.”
The aim of the cities module is to put the authors or the historical period in context. There may be some work in a lecture room, but mostly the learning takes place on the streets, in churches, parks and other historical buildings. There are additional pedagogical objectives which this on-location learning aims to achieve including improved retention, and increased interest, curiosity and motivation in the learners. “There is something about being in the real place. It brings the story alive,” says Bjartveit.

The course on Leadership, for example, includes a study tour in England which focuses on Elizabeth I in her early years as queen and her approach to the role of leadership. It includes:

Day 1: Elizabeth I - Based at the Tower of London
Experiences which create great leaders, setbacks as a means to learn, the role of a leader, from possibility to necessity, inner vs. outer, typecasting of leaders.

Day 2: Hamlet – The Globe Theatre
The role of a leader, leaders who are trapped in expectations of the role or roles that cannot be played, something is rotten in the state of Denmark – delusions in the real world, Hamlet's solution, the man who could not make up his mind (Hamlet) and the woman who could (Elizabeth).

Day 3: Elizabeth – on becoming a leader - The Thames and Greenwich Castle
Leadership in a changing theoretical perspective, basic needs of a leader, gender and leadership, roles, myself as a leader, the man who could not make up his mind and the woman who could – further discussion.

Day 4: Elizabeth – the Virgin Queen - The National Portrait Gallery
Elizabeth as Director, social identification, self awareness to personal presentation, business-oriented identity, a leader's effect on colleagues. Followed by performance at the Globe Theatre.

Participants

The average age of people on these programs is 38 years, and prior to confirmed booking the administration team at BI are careful to ensure that there is a match between the objectives of the person wanting to attend and those of the program. Most of the administration staff have attended all or part of the programs themselves, so have a good insight into them. Glenn Rudd adds, “This approach does not function with a young audience. This is more for adults with good work experience behind them. You get people at the time of life where they start to ask questions of themselves, not only as a manager, but as a person. We can help them focus as an individual on their personal development and to see new perspectives.”

The majority of people who come on these courses have chosen to do so as individuals. A common comment from applicants having read the prospectus is “this is what I need at this point in my career”. Selling to the HR organization may be more of a challenge, and requires a modification to the curriculum to focus more on teams, although this format is successful in Bjartveit and Eikeset’s
consultancy business outside BI. Glenn Ruud recognises that this type of program appeals more to individuals and to Norwegians in particular. “The current trend in Norway is to focus on Human Capital – the individual within the organization. These sorts of programs focus on the individual and are structured to appeal to the way Norwegians reflect and learn.” If an individual has attended a program, he or she may find that colleagues do not really understand the concepts, but Bjartveit adds “there is still enormous value in being able to reflect as an individual on say, the political aspects of power in modern organizations from a Machiavellian point of view, even if colleagues have no concept of Machiavelli.”

Bjartveit estimates that nearly 1000 people have now attended the perspectives programs, and gains pleasure from watching participants “in a bar all discussing Dante at the end of the day”. There appears to be a strong bond between those who have been through the experience, with many informal social networks continuing after the programs. Glenn Ruud observes that at BI graduation events alumni from various perspectives programs tend to cluster together, even though they may not have met before.

“We would not continue if these programs were not in high demand,” Glenn comments, and having attended one, “there is a high proportion who come back for further programs of the same type”. To BI success is measured by market demand. The BI team has tried to analyse why these programs work. Glenn feels it is much about seeing that different perspective on how to approach problems that surface in everyday life, and connecting more deeply with yourself and with human nature. Steinar Bjartveit considers is has something to do with universal truths and lasting literature. “If a book has survived for 500 years then it is likely to be read in another 100 years, but by then they will have forgotten all about Michael Porter.”

“*We do not give them a 10 point plan to successful management or a 2 x 2 matrix but new perspectives on management and leadership that they find useful.*”

Steinar Bjartveit

**Challenges and constraints**

- **Balancing innovation and structure** – BI thrives on its innovative reputation, and may be ahead of many of its competitors in this aspect of its culture. However there is always a balance that needs to be struck between giving ‘cowboys’ free rein and having a bureaucracy, at both individual and organizational levels. The school also needs to ensure that it does not go after all interesting innovative projects if they do not add value. The right mix of outside and full-time academic staff needs to exist to allow innovation and business experience but meet the goals of the school. Unlike some other schools, BI does not limit the percentage of external work for its Associates, which means a close eye must be kept to ensure the relationship remains win-win. The school also wants to have a balanced reputation consisting of a
strong academic stamp combined with good business experience.

- **Globalisation from Norway** – Most of the programs offered by BI are taught in Norwegian, which does limit international growth. There is a strong emphasis on Open programs, and until recently, on qualifications. Many were also developed for the Norwegian culture. Glenn Ruud observes that “in Scandinavia although we are known for being reserved, shy people and not very emotional in character, it is also a cultural perspective of Scandinavians to be quite open even with strangers on issues like personal development”. As the school expands its reach, some adaptation will be required.

- **Time to market** – the perspectives of management courses are intensive in both development time and in use of the faculty who run them, many of whom are not full-time academic staff. This format has both advantages and disadvantages. The school is unlikely to invest its full-time faculty in such intensive development, so it gains by making use of consultants who can develop and hone the experiences outside of school hours. However, the knowledge and skills are often resident in a few people whose long term career may not be focused on BI.

**Key success factors**

- **The BI culture of innovation.** The culture is very evident at BI. Staff at all levels speak with genuine enthusiasm and energy about how they are encouraged and given the freedom to look for new and better ways to move the school forward within its overall strategy. The buildings in Oslo are almost entirely glass with an open plan layout which stimulates discussion and the formation of cross-functional teams. “BI is a very good school because it allows this kind of (innovative) thinking alongside traditional management education. BI signals that it believes in a balance,” says Glenn Ruud.

- **Skilled, risk-taking tutors from cross-disciplinary areas and solid academic background.** The school aims to provide a strong academic foundation, good innovative ideas from all parts of the school, and staff who are willing to implement those ideas, working across disciplines to do so.

- **A match to the needs of the market.** The school is very much driven by market demand which ensures that new products and programs are developed and maintained only if they succeed in the marketplace. Innovation is therefore not ‘random’ but follows good Darwinian principles.

- **Administration staff who understand the programs** – the administration staff attend programs for which they are responsible to gain hands-on experience and are encouraged to suggest improvements based on client feedback. Frequently administrators are dedicated to the program set, such as those for Bjartveit and Eikeset’s courses, ensuring that they
understand and can communicate the philosophy behind them. People are asking for more and more expert advice on the best programs for themselves before they sign up. “You can’t have the normal business school gap between administration and faculty on these types of programs – it’s a real partnership,” comments Steinar Bjartveit.

**Evidence of impact**

BI was founded upon and continues to have a reputation for innovation. It draws to it as faculty, administrators and course participants those who want to link quality with innovation. It has created a self-perpetuating model.

There have been about 1000 participants on the perspectives of management courses both inside and outside BI. One measure of success of such programs is their popularity and there is high ongoing demand and repeat business from prior attendees. At least one course, ‘The Renaissance Leader in Florence’ was developed based on student demand for both additional learning of this type and on these subjects, having attended the Consultancy module.

Åge Petter Christiansen of Hodejegerne Møllerstad Christiansen AS, a specialist management recruitment firm, has attended three such courses. His views are typical of the participants. He does feel that the courses are best suited to the more experienced manager and may be wasted on those who have not had time to develop in a managerial role. On a personal level, he was looking for a course and faculty who would give him “real inspiration to study and to develop” and having attended his first course, felt that the teaching approach and the fact that the learning was on-site were critical to meeting those objectives. “(Being) on-site gave me much more motivation and inspiration and allowed me to learn from history in a much more productive way”. Although many may query the applicability of historical ideas to today’s world, in his experience “(this approach) is highly relevant because these courses deal with important existential questions for today’s leaders”.

**Into the future**

BI as a school wants to continue to change and innovate. With the vast majority of the courses taught in Norwegian and based on its culture, changes are being developed to adapt to a more global market. Under the direction of the new President, Tom Colbjørnsen, the school is focusing on internationalisation and corporate themes as it moves into the future, maintaining its drive for innovation.

BI is also looking at what it does best and where it can gain a natural market share, so is moving into specialist niche courses such as for the energy, shipping, telecoms and media industries.

“Many people think ‘Norway’ – shipping, energy, oil; they see it immediately. Instead of standing next to Harvard selling finance and leadership with people thinking ‘why go to Norway?’, we need to look at these niches.”

*Glenn Ruud*
In term of the perspectives on management courses, Steinar Bjartveit and Kjetil Eikeset, for the moment sees 'more of the same model'. The foundation research and development of each of the programs takes 2-3 years, and therefore there is a long development phase before a new program is brought to market, but he has plenty of new ideas on critical locations linked with core classical texts and their application to modern business. Each individual running of a program may vary depending on the needs of clients but as a model it is seen as enduring.

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