



DProf thesis

**The future of corporate learning and development in technology  
accelerating organisations**

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## **Doctor of Professional Studies**

*This research project is submitted in partial fulfilment of the requirements of the Doctor of Professional Studies (DProf) awarded by Middlesex University.*

## **The Future of Corporate Learning and Development in Technology Accelerating Organisations**

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*Submitted: July 2023*



## Abstract

Every year, global organisations allocate massive resources to learning and development (L&D) to prepare their employees for the challenges that lie ahead. According to research conducted by Beroe in 2021, the global learning and development market size was worth \$367 billion growing to reach \$402 billion by 2025. I sought to analyse this investment by L&D in the context of new and growing tech organisations.

My research sought to analyse the introduction, role, structure, and contribution of the corporate L&D function and determine whether it adequately meets the needs of accelerating organisations. I define these as technology-driven businesses in a context of start-ups, scale-ups and hyper-growth.

Grounded on fieldwork conducted at the height of the global pandemic, my research has two core objectives. First, I sought to identify the conditions under which the introduction or formalization an L&D function could boost growth and productivity in an accelerating organisation and the adequacy of current L&D models and methods to support this process, and second, the L&D skill set required to achieve these aims.

The corporate L&D function is socially constructed, as learning leaders primarily draw from each other's experience, expertise and knowledge. For this reason, my research follows a qualitative research approach based on a bricolage of semi-structured interviews and professional conversations with corporate heads of learning, chief people officers, thought leaders and industry analysts.



Through these interactions, I gathered data on learning functions in already accelerated organisations, including when they were introduced, their initial purpose, and their evolution in supporting the company's growth. These conversations yielded rich insight on innovative approaches and methodologies that could serve as a guide for rapidly accelerating organisations as they navigate the complexities of developing their workforce whilst addressing the challenges inherent in a rapid growth trajectory.

At the same time, research participants gave me a front-row view of their organisation's employee base, how it interacts with technology, and the benefits of incorporating a managed L&D function to enhance organisational outcomes. Finally, I compared and contrasted the competencies of L&D professionals currently operating in this space with the insights shared by my research subjects. In this way, I aim to establish how the L&D function can optimally contribute to preparing the workforce of the future and support organisational development in the accelerating technology space.



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&

Tamara and Philipp FERSCH

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## Glossary of Terms

Acronym	Explanation
<b>ADDIE</b>	Analyse, Design, Develop, Implement, Evaluate
<b>CBT</b>	Computer Based Training
<b>CI</b>	Cooperative Inquiry
<b>CLO</b>	Chief Learning Officer
<b>HR</b>	Human Resources
<b>HRIS</b>	Human Resource Information System
<b>IPO</b>	Initial Public Offering
<b>L&amp;D</b>	Learning and Development
<b>LDA</b>	Learning and Development Accelerator
<b>LMS &amp; LXP</b>	Learning Management System and Learning Experience Platform
<b>LPI</b>	Learning and Performance Institute
<b>OD</b>	Organisational Development
<b>PD</b>	People Development
<b>ROI</b>	Return on Investment
<b>SCORM</b>	Sharable Content Object Reference Model
<b>TD</b>	Talent Development
<b>TLAD</b>	Talent, Learning and Development
<b>TM</b>	Talent Management
<b>xAPI</b>	Experience Application Planning Interface



## 1. Introduction

This doctoral thesis describes my qualitative research on the role, remit and future of the corporate learning and development (L&D) function in rapidly accelerating tech-driven organisations. In this chapter, I introduce my domain and purpose statement on what inspired my investigative pursuit.

My career in corporate learning and development (L&D) began in the early noughties, giving me a front-row seat to its transformation over the past two decades. From simple interface Computer Based Training (CBT) to gamification to virtual and augmented reality, from classroom-based learning to remote, social, collaborative and continuous learning, the industry has witnessed significant shifts. In some organisations, L&D forms part of a broader talent management agenda, and/or incorporates high-potential development and performance management. In these cases, corporate learning and development has evolved to meet the changing needs of organisations and employee skillsets.

However, upon reflection of my practice and observations of the 'new' face of organisations whose growth trajectories are rapidly accelerating through technology, I see a disconnect and a paradigm shift. Against a backdrop of non-stop technological disruption, a changing labour demographic and 'high-speed business needs' (Spiro and Bhamidi, 2018), I question whether the current make-up of corporate learning and development can adequately



respond to the accelerating organisation's evolving skill needs and the rapid pace at which their employees need to learn.

In my study, I use the term 'accelerating organisations' to describe those founded on a platform of technological advancements, as well as those whose accelerated growth trajectory derives from the technology they are building and/or selling. While defined in greater detail later in my thesis, accelerating organisations briefly refer to:

- (a) **Technology firms in start-up mode**, either in the process of securing or having just completed funding that are starting to think about organisation structure and physical team expansion. Also included in this category are **firms in hyper-growth/scale-up mode** that moving out of the start-up phase and into a steep growth trajectory either through increased funding (additional investment or IPO) or an increased demand for their product/service.
- (b) Firms that significantly modified their operating model and portfolio of products and services as a result of **digital transformation or in simpler terms, technology-driven change**. These are usually large, established multinational firms, usually with over USD 1 billion in revenue that seek to leverage the power of technology to reinvent themselves and enhance their relevance for today's market and world.



Given their uniqueness, I felt these organisations needed to be defined and studied separately.

I have questioned where L&D needs to align and the evolution of its future role. If L&D entails preparing the workforce to carve out a new niche in what will eventually become a 'virtual revolution' – the antithesis of the industrial and technology revolutions of the 1780s and 1980s – what skills does the workforce of the 2020s really need to perfect? Should we consider the shift in employee roles within organisations in the context of the upsurge in automation and artificial intelligence?

Ultimately, L&D needs to be reimaged to meet the demands of a very different workplace, one in which the dominant human contribution could potentially be *thinking*, *strategizing* and *communicating* rather than physically *doing*. The global pandemic catalysed the need to address these questions and pointed to solutions with long-reaching implications for the field of corporate learning, as explored in depth in the 'Findings' chapter.

If the structure of the L&D function needs to change to ensure its long-term relevance in global organisations, another concern is the current skillset of L&D professionals.

#### Statement of Purpose

In my view, the L&D profession and practice are at a cusp in their evolution, prompting an urgent need to better understand whether the L&D function and L&D professionals can maintain their relevance, and the necessity to explore possible strategies steps to ensure this – this is the purpose of my research. I aim to establish the point at which an accelerating



organisation's evolution should introduce a managed learning function (if indeed they should), and the role, structure and remit of that function. My final research document aspires offer options and recommendations for newer and transforming technical organisations as they establish or enhance their L&D functions during hyper-growth.

I analysed organisations greatly impacted by technology change or built on new technology that cater to traditional industries such as banking and retail to revolutionise how they operate. I looked at founders and leaders in these organisations, heads of people and learning, and thought leaders, consultants and advisers to these firms.

According to Fortune Business Insights, the global value of the talent management software market was estimated at USD 5.19 billion in 2018, and forecast to rise to USD 11.09 billion in 2026 – and these figures are pre-pandemic. To me, if the L&D function aims to continue to serve a meaningful purpose, our focus needs to shift from vetting and purchasing finished products to cultivating sustaining environments.

I have also examined the skills of learning professionals to establish if L&D is appropriately positioned to not only prepare, but continuously enable, the workforce for their roles in this ongoing virtual revolution.

### Aims

My aims were as follows:

- 1) Identify the conditions under which introducing L&D services or formalising an L&D function could effectively drive further growth and productivity within an accelerating organisation.



2) Specify the set of capabilities most likely needed by L&D professionals operating in this environment.

In a world of disruptive technologies, organisational and structural change, and a rapidly evolving business landscape, my ultimate aim was to shed light on the requisite role and structure of such a function to effectively enable organisations' talent to thrive. To this end, I bring in my personal context and the evolution of my role and its remit in an accelerating organisation.

#### [My Situatedness As a Learning Professional](#)

My current role in my organisation and community of practice allows me to act as an evangelist for my findings. I have socialised my research in interviews with Learning Now TV, Looop podcasts, the Learning Hack, MAAS Marketing podcasts, and Women in Learning and Development – to name a few. I have also shared my views as a guest speaker at several conferences, including UNLEASH, LPI and the Learning and Development Accelerator, where I was recently appointed as a board member. I also serve on the advisory group for AWS Re:Start, a global programme by Amazon Ltd. aimed at teaching technical skills to people from non-traditional routes of education. In 2021, I authored a book chapter in *L&D's Playbook for the Digital Age* by Brandon Carson, based on my conclusions on the use of analytics in learning. I have also been invited into accelerating organisations as a speaker to share my thoughts with L&D and broader people functions on their role ways of engaging with the business.



## Current role

My findings have greatly guided my role in creating The Academy. My organisation is an accelerating organisation – a technology firm in hyper growth. I was brought in to set up the firm's corporate university, the Academy, whose primary aims are to forge a pipeline of young and career-changing technical talent, reduce the time to competency, lower talent-acquisition costs, and decrease attrition. Our approach entails recruiting and developing grass-root talent amongst young people who otherwise might not have the benefit of an advanced degree, as well as re-skilling unemployed professionals. After completing the Academy programme, they are transitioned into the businesses in permanent roles. The aim is to give back to the firm's communities of operation, whilst building up a pipeline of new talent, skills and potential for the future workforce.

In Davos 2020, world leaders estimated that roughly one billion people worldwide would need to be upskilled by 2025, mostly in technology, to make up for the job deficit as a result of automation (Moritz, 2020). At the Academy, the value of every learning intervention is measured in business outcomes, whether these are increased sales, lower salary cost at sourcing, lower attrition, quicker billability or enhanced production levels. In 18 months, the Academy had upskilled over 400 inexperienced associates with a 91% transition rate to the business. With over 10 curriculums in technical, interpersonal, business and core consulting skills, and operations in 15 countries, the Academy has been recognised by the European Union's Pact



for Skills and the European Association for Apprentices as the provider of skills and opportunities for young people in technology.

Measurable business and performance outcomes, pathways based on experiential learning and teams comprised by diverse roles beyond L&D were among the main themes to emerge from my research. I hope to harness these key learnings to continuously build our academy and its global learning initiatives, while offering insight to help corporate L&D achieve organisational success in periods of hyper-growth.



## 2. Context

To explain my context, I begin with an overview of the learning function in the organisation, followed by descriptions of my knowledge environment, organisational context and community of practice. Next, I share my research journey and lived experience before concluding with the industrial and academic context.

### [An Overview of Organisational Learning and Development](#)

The L&D function, also known as the Department of People Development (PD), Talent Development (TD) or Talent Learning and Development (TLAD) function, is a core and fundamental part of many global organisations. Among their objectives, they provide learning opportunities, guarantee compliance with statutory or regulatory requirements and ensure employees are equipped with the requisite skills to fulfil their current roles (CIPD, 2015).

Organisational training functions have existed since the first industrial revolution (TrainingZone, 2015). In today's business landscape, their role, size, adoption of technology, reporting line and alignment with business strategy vary according to the firm's maturity, size and stage of evolution. Over time, the remit of the learning function has gradually evolved by recognising the differences in how people learn at work and providing more on-demand and continuous learning. Whilst L&D continues to design, deliver and manage modern training experiences, their role has grown to



include enabling and supporting continuous independent learning (Hart, 2018).

In recent years, some experts have called into question the remit and contribution of L&D to the organisation. Concepts around performance consulting (Robinson and Robinson, 1995), learning analytics (Mattox, Martin and Van Buren, 2016) and business relevance are increasingly featuring in L&D vocabulary. The global pandemic thrust L&D's contribution and methods for delivering outputs into the spotlight (Freeland, 2020), forcing it to quickly shift toward more digital solutions to engage and support a geographically dispersed workforce. These ramifications are explored in greater detail in this section and throughout the course of my research.

I delved into the history of the function to better understand the values and philosophies underpinning its early introduction and their evolution to modern day, in which they are largely decoupled from business strategy. A 2018 Brandon Hall study underscores this situation: only 41% of companies reported having learning strategies in alignment with business goals (Brassey, Christensen and van Dam, 2019), and only 6% considered them highly effective to help achieve them (Wentworth and Pachter, 2018). Gaining an in-depth awareness of the current state of affairs an important first step to establishing what ought to be done differently in new and hyper-growth and accelerating organisations.





Figure 1: History of Corporate L&D.

Figure 1 depicts the evolution of training and development from the 1800s until its first formal introduction in an organisation. The AllenComm diagram starts with the creation of war games in 1812 to train Prussian and



German armies (Lewis, 2016). Both the aforementioned and Welna (2019) discuss the National Cash Register Company and its introduction of the sales training and human resources function between 1892 and 1894. From this time onward and through the two world wars, two very important observations stand out:

- **Learning is inextricably linked to knowing how to do your job and increasing productivity.** This also coincides with Taylor's 1911 theory of scientific management, whose central metaphor compares organisations to machines and its employees as interchangeable cogs, who can be designed for maximum efficiency and replaced like for like. In this model, training is about performing and perfecting a task, not about educating to think or bolstering innovation or creativity. Standardisation was the goal. In some ways, we now see echoes of this view in compliance training – what one should and should not do for legal and regulatory purposes.
- **Learning, more commonly referred to as 'training' in history annals,** existed alongside human resources (HR) as a method of managing and training employees to achieve business efficiencies.

Historically, training was coupled to local exigencies of preparing people to do tightly defined tasks, which were often divorced from the broader purpose of their fit within the whole. Now, the expected role of the L&D professional in the 21st century is to serve as a manager, change agent and architect of organisational learning (Garavan et al., 2020). In their



study of 440 professionals in 125 organisations, Garavan et al. highlight four significant shifts that L&D should undertake:

- Concerted efforts to address increasingly complex operational and strategic L&D issues.
- Stronger emphasis on forging relationships with diverse stakeholders and adapting a long-term perspective.
- Efforts to acquire a deeper understanding of the business, develop strategic skills and reduce reliance on technical or specialist L&D expertise.
- More strategic thinking and a pivot from fast decision-making towards grappling with ambiguity.

So why, more than 100 years after its inception, does L&D still need to prove its value and make a case for a 'seat at the table'? This phrase is included in everyday parlance in reference to L&D, echoed often by experts and peers to signal the frequent disconnect between L&D and business decisions on strategy and people. In his white paper on L&D value creation and business models, Arets (2019) humorously notes, 'If you're not at the table, you're on the menu' in the title, an allusion to how often people development is discussed without L&D functional representation. In my view, L&D's evolution and progressive focus on content creation and dissemination might partially explain this predicament.

The 'systems approach to training', pioneered by the US military and subsequently adopted by British armed forces in the late 1950s, enshrined the idea of training and enabling objectives. This approach was the origin



of the well-known phrase, 'By the end of this lesson, you will be able to .....'. As originally defined by these military groups, learning had three primary aims: operational, training and enabling. Only the enabling objectives were abstracted from reality; training objectives were done with real kit although in safe, non-operational environments.

In the operational setting, the gaps between job training and operational objectives were closed through workbooks and mentoring. Learning was abstracted from the context of the job at hand. This trend continued throughout the 1980s and 1990s, when a rising use of technology spurred the mass creation and dissemination of learning content. This phenomenon arguably magnified the precedent trend of abstracting the learning from the operational context. Bite-sized learning is perhaps the most extreme example, given its complete dissociation from practical application in all but compliance training.

#### Fundamental Paradigms in L&D

Whilst definitions of L&D remain relatively similar across the industry, both my experience and research revealed key paradigms regarding its composition that merit further exploration.

By way of illustration, a study by Somasundaram and Egan (2004) examines 35 definitions of L&D in organisations by various authors and scholars, and classifies them into areas of focus and key elements. Two of the three paradigms mentioned provide insight on the L&D context: (1) L&D exists for employees to develop or gain knowledge or skills and (2)



L&D exists to improve performance and thereby improve organisational efficiency.

In my view, the 'how' behind the pursuit of L&D in helping develop knowledge and skills is key to defining its role within the organisation. I refer to this as the 'content conundrum'. The second is how L&D see their role in *enhancing both individual and business performance* – their endeavours to establish this vital link and continuously improve it.

Technology to me, represents a third paradigm. Vasant quotes the definition by the Association for Learning Technology as 'the broad range of communication, information and related technologies that are used to support learning, teaching and assessment' (2014). How the L&D function views and uses technology in the organisation context to support the dissemination of learning is explored later in this section.

#### [The Content Conundrum](#)

Social constructivist and L&D scholars, both former and modern, agree that people learn through experience and interaction. The famous 70:20:10 theory refers to the 70% of knowledge derived from job-related experiences, 20% from interpersonal interactions and the scant 10% from formal educational events (Jennings et al., 2015).

Vygotsky's sociocultural theory of human learning describes learning as a social process, wherein social interaction plays a fundamental role in the development of cognition. Knowledge construction occurs in a social context that involves 'student-student and expert-student collaboration on real-world problems or tasks that build on each person's language, skills,



and experience shaped by each individual's culture' (Vygotsky, 1978, p. 102).

Kolb's (1984) experiential learning theory also places experience and reflection as key sources of learning and development.

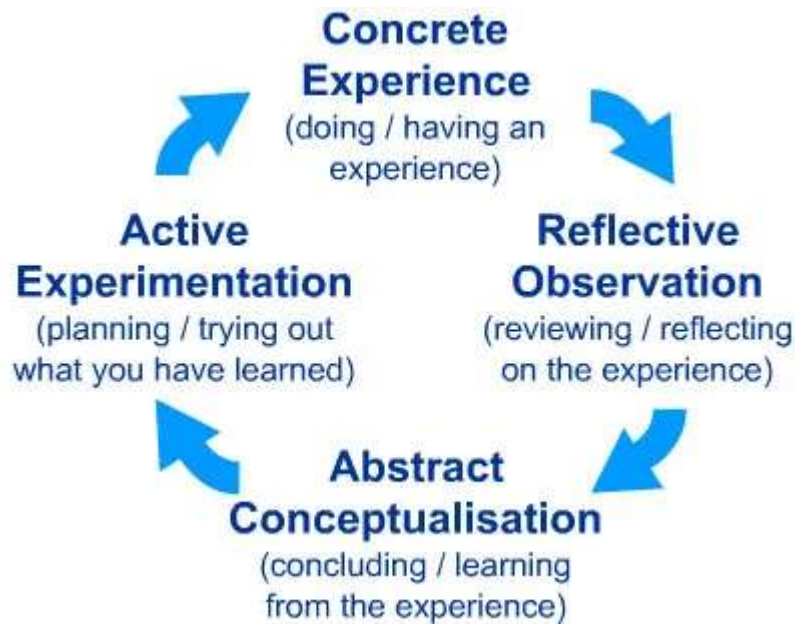


Figure 2: Kolb's Reflective Cycle.

Given the marked emphasis on experience and reflection in learning, it is surprising that the role of L&D is largely interpreted as a purveyor of content. According to the LinkedIn 2020 Workplace Learning Report, L&D professionals dedicate over 60% of their time toward building, sourcing and promoting content. As a possible solution, the report points to the benefits of purchasing a curated content library to gain efficiencies – such as their product, LinkedIn Learning.

From content creation to curation, from hosting to management, the role of L&D centres around the procurement and dispersion of training materials and content in the organisation. Vast sums of the L&D budget are allocated



to this aim. At the same time, the number of vendors selling large content libraries or creating bespoke content has skyrocketed over the last few decades. According to Global Market Insights, the worldwide market size for e-learning is at around \$200 billion and growing. Training Industry estimated the global size of the corporate training market at \$370.3 billion in 2019 (Taylor, 2020).

For me, the sheer size of this market makes it difficult to affect change at a provider/consumer relationship level, and engage in productive conversations with organisations that continue to interpret learning as 'a course' whose successful completion is invariably tied to generating greater knowledge and/or enhanced productivity. These challenges continue to be discussed in greater detail at various points throughout this thesis.

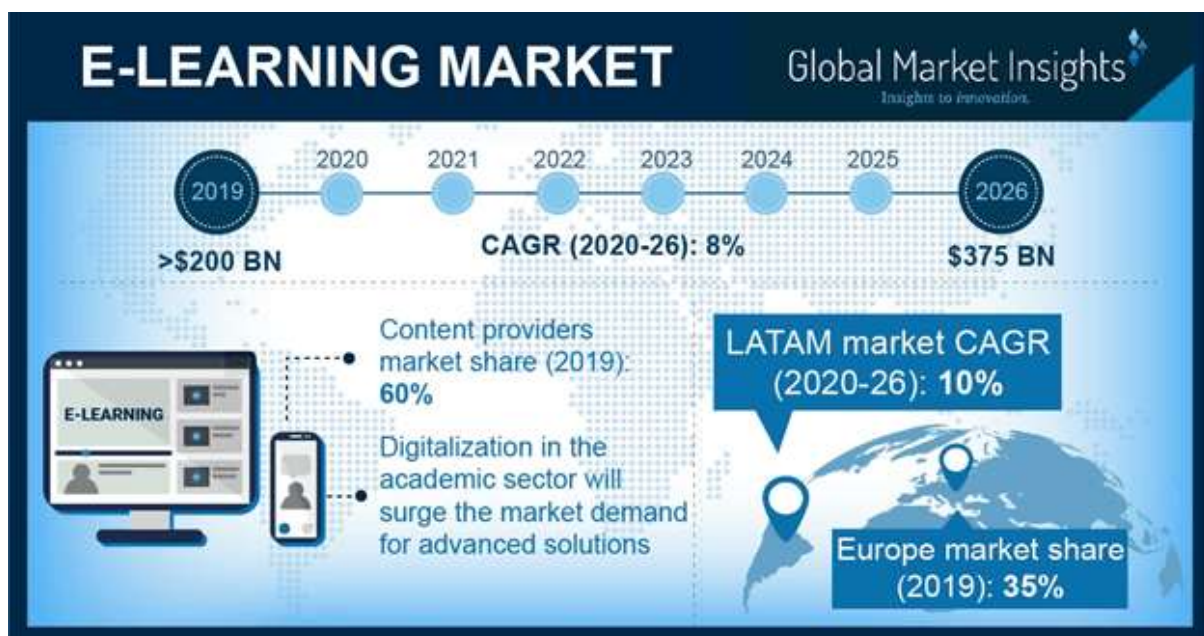


Figure 3 e-learning market overview

Only in recent decades has the education system challenged the concept of 'content knowledge' – the notion that knowledge is acquired via the provision of curriculum and subject matter (Glossary of Education Reform,



2016) – by distinguishing amongst content, knowledge, skills and context. I would postulate that, for the most part, this hasn't really translated to the corporate L&D function. Since Polanyi (1966), we have come to realise that tacit knowledge helps us function in our current environment. Defined as knowledge that can only be described in terms of performance – i.e. riding a bike, tying a knot, etc. – tacit knowledge is another reference to experiential knowledge, which refers to skills and abilities acquired through experience or tribal knowledge. In this regard, tacit knowledge often spreads throughout an organisation without being documented, and possibly never actively pointed out or discussed (Oragui, 2020). It is also how people learn in organisations: through a tacit understanding of how things work and support by those around them who know.

Some accelerated organisations effectively recognise and leverage tacit understanding by ensuring the transfer of knowledge without 'courses'. Google offers one example of tacit knowledge transfer: in a study by Stringer (2020), 80% of the company's tracked learnings are via employee-to-employee (Googler-to-Googler) network, which includes more than 6,000 employees who voluntarily share their knowledge and skills in workshops, one-on-one sessions and other training initiatives.



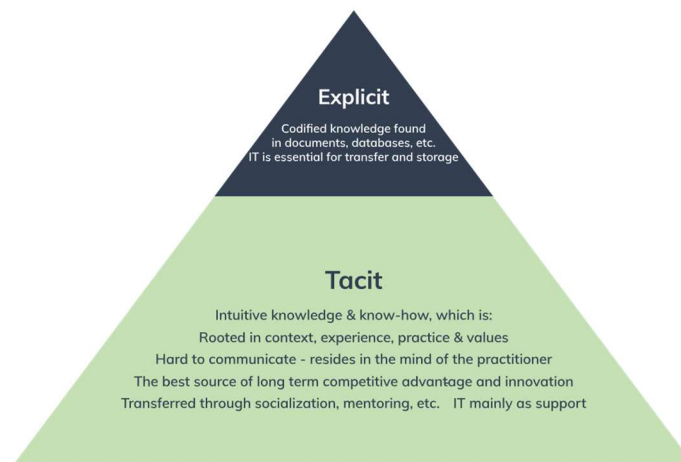


Figure 4: Explicit Versus Tacit Knowledge.

Conversely, content embedded within the framework of explicit knowledge – the chief focus of most L&D strategies – doesn't represent how adults learn in the corporate context, where tacit knowledge is largely unrepresented in curriculums and knowledge systems.

In my experience, there is no real evidence to support L&D's outsized investments in offering content, but as long as learning is equated to the acquisition of content and knowledge, not much is likely to change. I explore the implications of this supposition in the 'Literature Review' and 'Findings' chapters.

#### The Role of Technology

It is impossible to separate the acquisition of learning content from the technology used to store and disburse it. Large market players like LinkedIn Learning, Udemy and Pluralsight have pre-packaged thousands of e-learning courses, videos, expert talks, white papers, case studies and other learning artefacts in licence-accessed content libraries. Against this



backdrop, the role of L&D extends to managing the technology and platform, curating its content and filling in gaps on demand.

For the purpose of discussion, I have broadly classified how L&D interfaces with technology into three groups: (1) digital learning content via the providers and sites like the aforementioned, (2) the platforms that offer access and interaction with this content (LMSs and LXPs, for example), and (3) delivery enablers such as WebEx or Adobe Connect. In the following diagram, Teachthought breaks down these categories and their uses even further:

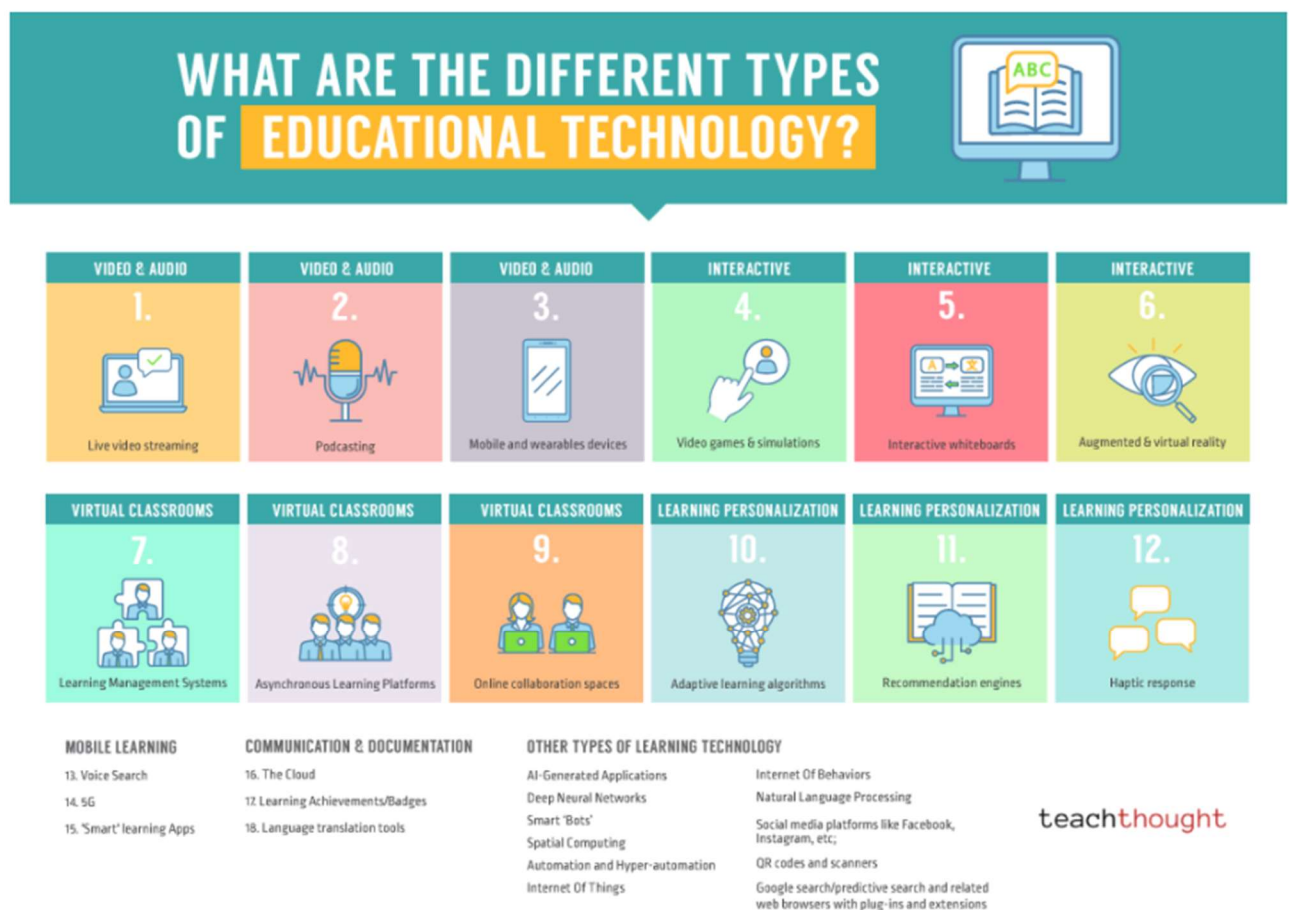


Figure 5: Types of EdTech.



In most organisations – and particularly technology organisations – learning is intrinsically linked to its underlying technology, delivery channels and digital artefacts. The significance of the learning platform and its role in corporate L&D is not new, but the rapid growth of digital and online learning, combined with advancements in platform functionality, including collaborative, interactive-based and user-created learning, means that the LMS (learning management system), LXP (learning experience platform) and LP (learning platform) will surely form part of the future landscape of corporate learning.

Learning management systems were created as a follow-on from e-learning or computer-based training (CBT) to help administer, document, track, report, automate and deliver educational courses, training programmes and other L&D offerings (Ellis, 2009). Oxagile has created a succinct infographic tracing of the origins of the learning management system to modern day (Figure 6).

LMS programmes date back to 1924, when psychology professor Sidney Pressey invented the first electronic teaching device, which was a typewriter-like contraption that administered multiple-choice questions. Since then, LMS offerings have evolved to today's sophisticated cloud-based systems, whose market is expected to grow from \$9.2 billion in 2018 to \$22.4 billion in 2023 (Bouchrika, 2020). Platforms now have embedded content creation and integration via sophisticated technologies like SCORM and xAPI, and analytics far beyond course completion and user demographics. As Davis, Carmean and Wagner predicted (2009), learning

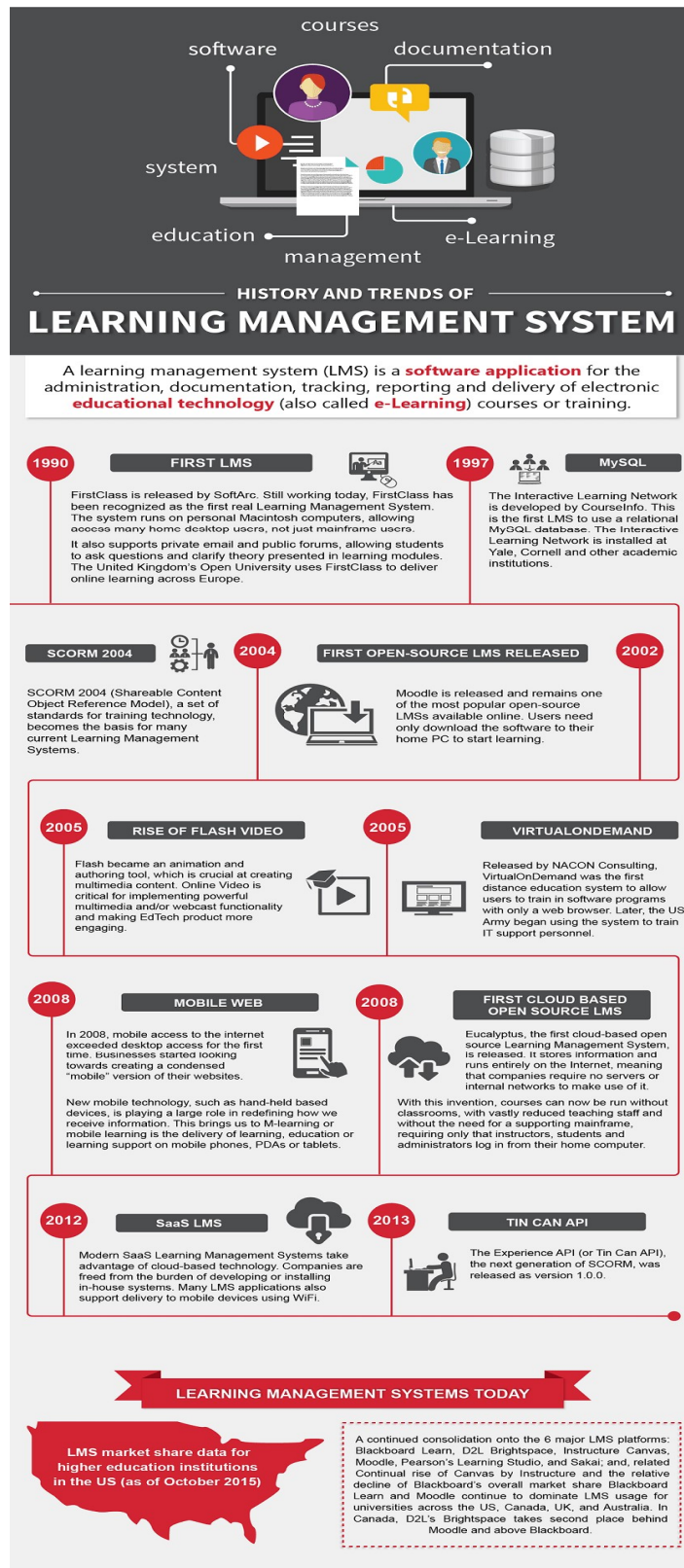


management systems have undergone significant shifts over the last decades:

“Going forward, relevant learning management systems will continue to expand core services so that ‘mission critical’ includes many of the traditional capabilities learning enterprises have come to depend on. They will necessarily track user behavior across a wide variety of sites, and across multiple devices and distribution media. They will be flexible and offered in the way LMS customers want. They will offer ‘on the fly’ licensing (meaning that people will want to buy the rights to use software – or parts of software – on a per need or some other more ad hoc basis than traditional software licenses). This will reflect the changing nature of the workforce, and will need to be highly configurable and to easily integrate with the other software used to facilitate learning and talent development.”

Today’s systems do this and more, as examined in greater depth in the ‘Literature Review/ Knowledge Landscape’ chapter. Later in this chapter, I will touch on the complex process of a request for proposal when selecting a learning platform and common pitfalls to avoid, as well as the exponential rise of learning tech applications during and following the pandemic. The following section includes observations based my experience and research interviews.







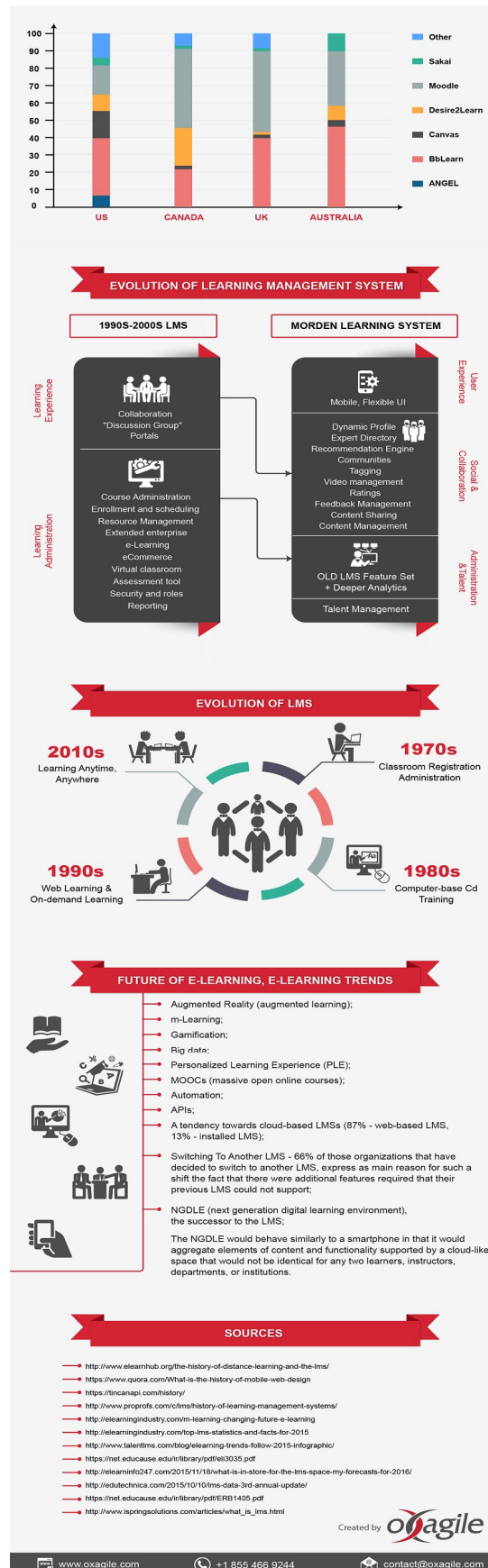


Figure 6: History and Trends of Learning Management Systems.



Although learning impact is explored further in the 'Findings' chapters, I would like to briefly mention the wealth of data learning platforms provide and why they skew the context of L&D in organisations.

Broadly speaking, learning platforms provide the following user data (Pappas, 2016):

1. Completion rates: do online learners actually complete the e-learning course? How long does it take them to finish up each task or module?
2. Online learner performance and progress: do online learners breeze through the tasks or do they struggle with certain aspects of the e-learning course?
3. E-learning assessment scores: measurable data to improve e-learning course design and/or identify online learners' strengths and weaknesses, information that can serve as the basis for personal learning paths.
4. Online learner surveys: one of the most direct and measurable forms of e-learning feedback in which learners share their honest opinions and recommendations.
5. Peer-based feedback: comments captured through e-learning forums, social media groups, online group collaboration projects and learner-generated online content.

The most widely used e-learning software specifications to track learner data are xAPI and SCORM. A summary by Downes (2021), one of the



authors of the xAPI, reveals the types of data that organisations typically extract from learning management systems:

1. Learning data generated by xAPI e-learning courses
2. Learning data generated by non-xAPI (typically SCORM-based) e-learning courses
3. LMS course assignments, completions and results
4. In-person training registration and attendance
5. Search terms, if the LMS has search functionality
6. Interactions with other LMS features, such as discussion forums or recommendations

There are typically three overriding themes – time spent on the platform, course completion and learner experience – grounded on the assumption of a positive relationship between time spent on the platform and the consumption of learning, number of artefacts consumed and user-experience feedback. In a nutshell, what started in the 1950s with Kirkpatrick's first level of evaluation of 'giving the learner a good experience' continues until today, with technology as the enhancer.

In some cases, the emphasis on user experience seems to overshadow business alignment, prompting the need for the L&D function decrease their focus on content provision and its associated technology delivery systems, and refocus their energies into how adults in corporations learn, the enablers of the learning process, and how L&D offerings impact business performance.



## Enhancing Performance

The final paradigm addresses both individual and business performance. The focus of L&D on content delivery as the main driver of organisational learning is based on the premise that individual upturns in explicit knowledge will translate into upturns in individual performance, which in turn will boost collective performance and enhance overall organisation performance. This large assumption underpins the entire L&D field.

As observed by David James (2018), CLO of LOOOP:

"The point of L&D is to affect performance from Day One with induction, to technical and core skills, transitions and change. There is a real need, both for the individual and the organisation, for L&D to help elevate performance, as well as individual and organisational capability. I know this. We *all* know this. But somewhere along the line, we've got stuck running programmes."

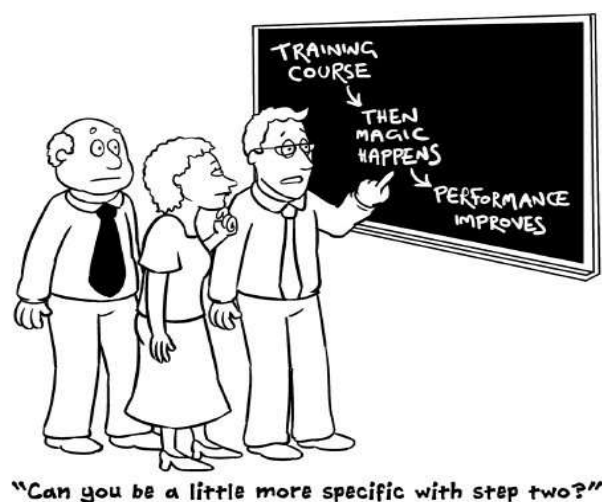


Figure 7: The learning explanation dilemma

More and more L&D leaders recognise their role in effecting individual and business performance. The 2015 Learning and Performance Institute's



Capability Map highlights 'performance and impact' as core responsibilities for learning professionals (see Figure 8), calling on L&D professionals to partner with customers and clients to analyse performance gaps, recommend performance interventions and measure the ensuing business outcomes.



Figure 8: LPI Capability Map.

There are two elements at play here: first, whether L&D offerings sufficiently impact individual performance, and second, whether they ultimately improve organisational performance. Somehow, the role of L&D has been conflated with providing more learning content and artefacts without connecting it to the 'how'.

Annual performance appraisals are a perfect example. Every year, employees are called on to assess their progress toward pre-defined objectives and establish new goals for the upcoming year, including an



individual development plan or goals. Of all the heads of learning interviewed for my research, not one said they have access to this information. The question is obvious: if these plans reflect everything employees believe they need to learn to improve their performance, why isn't L&D capturing these insights? Surely, these assessments could inform the organisation's learning needs for the year, learning strategy and budget. Like my interview subjects, as a head of learning, I similarly could not automatically access this information, and in one case, it was only granted after repeated requests.

The '\$5 million cash test' proffered by Fleming (2017) highlights this frequent disconnect between training and performance: 'Imagine you have a salesperson and you want them to close 100% more deals per month. Could they do it? More importantly, if you offered them \$5M cash to accomplish that in one month, would they succeed? Or would they fail miserably?' In his view, in 95% of cases, employees recognise their areas for improvement and don't require training but rather better processes, structure tools and culture to enhance their performance.

Based on the supposition that often organisational outcomes or issues are not a learning issue, L&D lacks the status to push back and might take 'the path of least resistance' by continuing to focus their efforts on offering more training and content.

The paradigms of content provision and its associated technology as the cornerstones of individual and business performance reflect the current L&D landscape and context. Later, I will explore how some L&D functions



are breaking through these constraints by redefining what learning and development means for accelerating organisations.

#### Current and Additional Industry Context

The global pandemic exponentially increased the reliance on online and virtual training delivery and artefacts. After years of advocating e-learning and virtual classroom approaches, COVID-19 accelerated the acceptance of using technology among educators (Soni, 2020), learners and L&D professionals (Figure 15). Going forward, it will be interesting to observe how these new online learning behaviours translate into a longer-term L&D strategy.

#### How automation is reshaping the labour market

Beyond the scope of my work, another industrial context also considered is the impact of automation on the jobs of the future. As reflected in the following table, its potential impact is staggering (Winick, 2018).



**Predicted Jobs Automation Will Create and Destroy**

When	Where	Jobs Destroyed	Jobs Created	Predictor
2016	worldwide		900,000 to 1,500,000	<a href="#">Metra Martech</a>
2018	US jobs	13,852,530*	3,078,340*	<a href="#">Forrester</a>
2020	worldwide		1,000,000-2,000,000	<a href="#">Metra Martech</a>
2020	worldwide	1,800,000	2,300,000	<a href="#">Gartner</a>
2020	sampling of 15 countries	7,100,000	2,000,000	<a href="#">World Economic Forum (WEF)</a>
2021	worldwide		1,900,000-3,500,000	<a href="#">The International Federation of Robotics</a>
2021	US jobs	9,108,900*		<a href="#">Forrester</a>
2022	worldwide	1,000,000,000		<a href="#">Thomas Frey</a>
2025	US jobs	24,186,240*	13,604,760*	<a href="#">Forrester</a>
2025	US jobs	3,400,000		<a href="#">ScienceAlert</a>

*Figure 9: Impact of Automation on Jobs in the Future.*

Based on the number of jobs expected to be created and destroyed in the coming decade, employees will require new skills, which directly affects the realms of L&D and workforce development. L&D structures and practices need to be inherently agile to rapidly address the skill demands and evolving business climate of global organisations.

As machines increasingly perform tasks once done by humans, agility will be paramount. People will increasingly assume roles with a human-centred interface, less likely to be replaced by automation. Given the breakneck speed of technological advances, the current L&D could soon become obsolete. What is needed at this crossroads in time? New key performance indicators (KPIs)? New capabilities? New strategies to manage talent? How should L&D pivot to meet the needs of this future business landscape? These are the questions my research seeks to answer.



### Futurist perspectives

The same futurists who speak of the rise in AI and subsequent destruction of jobs are quick to stress how humans can ensure their relevance. In the book *The Rise of the Humans: How to Outsmart the Digital Deluge*, the author, Microsoft's Chief Envisioning Officer, highlighted three fundamental human skills that cannot be automated: creativity, empathy and accountability (Coplin, 2014). Dearborn et al. (2018) concurred, stating, 'Organisations that focus only on automation will automate away their competitive edge, and that the most successful will focus instead on skills that set them apart and that cannot be duplicated by AI or machine learning. Those skills can be summed up in one word: humanness.' They break down humanness into 17 social skills, including critical thinking, active listening, social perceptiveness and imagination. In their view, these skills will be increasingly expected from employees as more tasks become automated.

My research also aimed to discern if the L&D functions in technology organisations appreciated these human skills as future-essential, and if so, how they were addressing them. If corporate L&D's reason for being is 'to develop the people so they can increase the competitive advantage and value of the business' (Doherty, 2006), the question at hand is whether the function provides the right environment, tools and solutions to cultivate more human-centric skills, attitudes and behaviours in a fast-paced landscape.



### Introducing My Personal Context:

My personal context can best be summed up from a line in B.J. Neblett's *Ice Cream Camelot* (2013):

"We are the sum total of our experiences. Those experiences – be they positive or negative – make us the person we are, at any given point in our lives. And, like a flowing river, those same experiences, and those yet to come, continue to influence and reshape the person we are, and the person we become. None of us are the same as we were yesterday, nor will be tomorrow."

I was raised in a one-bedroom, 450-square-foot apartment in the suburbs of Mumbai, India. I was educated in a Catholic household with a strong matriarchal influence and an even stronger emphasis on understanding the difference between right and wrong. Growing up, the guiding philosophy was that 'every day one must strive to be better than you were yesterday; through study, through being grateful for what you had, and by being fair to those around you'.

Viewed from a Western perspective, my family could be considered disadvantaged – but in India, you only had to open a window or walk down a street to find someone far worse off than you. I had access to education and libraries, the freedom to think and express myself, and the advantage of a diverse and secular environment where neither my gender nor my religion were barriers.

In many parts of the country, this type of education is not typical. I recognise the 'unavoidable social dimensions' for why and how I generated



knowledge (Russell J., 2010), and the unique nature of my societal context. That said, let me stress that nothing came easily. My lived experiences taught me to fear for my safety in certain situations, and my parents' open attitude about finances taught me that my textbooks would be public-library photocopies. University fees would also be financed in part through merit-based scholarships.

In this way, my parents instilled strong work values, conveying the message that there were no shortcuts, no alternatives to change, no substitutes for hard work in the pursuit of betterment. Any knowledge acquired and translated – be it in academia or music – would need to expand beyond my smaller current reality. Why is my upbringing important to my current context? How did it influence my decision to research and question my profession? I would stress two main areas of impact.

The first consideration relates to my family environment. Both the size of my home – and the size of our finances – meant that if 'it didn't fit or wasn't necessary, it couldn't stay or wasn't bought'. In an L&D organisational context, the notion of investing a limited budget in vast amounts of learning content without proper efficacy measures should seem absurd, yet this is precisely what happens in many L&D functions. In the same way, when rapidly growing organisations are considering which investments will help them grow and increase their bottom line, they too should consider 'what just doesn't fit'.

The second relates to the learning process and how knowledge is created, pursued and acquired. In my context, I made an intentional decision, a



conscious effort, a determination to improve myself, my circumstances and my surrounding environment.

On reflection, I find myself constantly drawing parallels between my 'fields' of upbringing and my professional 'field'. I grew up with an internal struggle to simultaneously conform to and challenge the 'social order that is progressively inscribed in people's minds' through 'cultural products' (Bourdieu, 1984). When considering my systems of education, language, judgements, values and everyday activities, I reflect upon what I accepted and what I rejected.

In India, examples abound of strong women who stood up against oppression and challenged stereotypes whilst still unconsciously accepting social differences and hierarchies. For instance, social activists fighting for women's rights while covering their heads in public, as expected in Indian culture. This was also visible in my family. Even though my mother and grandmother were more educated and out-earned their husbands, deferred to them on significant household decisions. In my Master's in Management Studies cohort, we were one woman to every 13 men, yet my human resources specialisation had only two male students in a class of 25. Did I reflect this same dichotomy, choosing to resist whilst still following the path of least resistance?

I started my DProf well into my career as an L&D professional. I held a leadership position and recognition within my community and my practice. Why did I 'discover a need to acquire new perspectives in order to gain a more complete understanding of changing events' (Mezirow, 1978)? When



did I evolve from seeking to learn as much as possible about my profession and my field to challenging the need for its reform, or worse still, its existence?

I describe these reflections as an out-of-body experience, since never before had I considered how my current actions might impact my later professional choices or paths. Whilst the future is an unknown, I always return to the guiding principle I was raised with: 'every day, one must strive to be better than you were yesterday'.

L&D needs to change to support the organisation of tomorrow. I am now more than a learning leader – my research is my transformative learning wherein I was 'struck by a new concept or way of thinking' that I have now 'followed through to make a life change' (Brock, 2013). It is more than my profession that I now seek to change: it is my place in L&D and L&D's place in the corporate world of tomorrow.

### [Introducing My Professional Context](#)

Over the last two decades, my professional context has evolved in the field of corporate learning and development, where I have worked across a full spectrum of roles.

I started out in learning operations before moving to instructional design and training delivery, and have since created capability frameworks, designed curriculums, implemented learning management systems and built entire learning functions both as an internal L&D team leader and as an outside management consultant.



Over the last two years, my role has expanded to include talent management (succession planning, workforce planning, talent acquisition and leadership development), career pathing, organisation culture and performance management. In my current position, I established a corporate university and educational philanthropy initiative. We source and train talent at the grassroots level, providing a bridge between education and employment to those who might struggle to find a foothold into the corporate world.

In addition to my corporate position, I actively participate in my wider community of practice, serving as a fellow of the Learning and Performance Institute and as a member of the board for the Learning and Development Accelerator. These positions give me ongoing opportunities to engage with thought leaders, vendors, authors and subject-matter experts. At the same time, I read the most relevant L&D publications including *Chief Learning Officer*, *Training Journal*, *Modern Learning Workplace* and *Future Workplace* to stay abreast of evolving industry trends and glean new insights on its future directions.

As jazz legend B.B. King once observed, 'The beautiful thing about learning is that no one can take it away from you!' My interest in learning about my practice extends beyond my professional role, and my practice is more than a 9-to-5 day at the office: it encompasses my community of professionals and our regular interactions, the industry I feel part of and responsible for, and the thought leadership and research I engage with. Whilst I continue



to grow and gain new perspectives, my journey from learner to curator of learning together make up my context.

The last five years of my career journey best explain how I arrived at my current personal agency. In 2016, I was part of a process at a global professional services firm, charged with helping to create a learning function and leading the team for the EMEA region. In this newly created role, I reported to the global head of L&D, who had joined six months prior and whose role also did not exist previously. With a 60-year history, the firm had an annual turnover of around \$700 million, 50 worldwide offices and global operations in 30 countries, yet until then had never considered incorporating a structured learning function.

Before the launch of this new initiative, the company's L&D consisted of regionally based systems trainers, who were loosely managed by resourcing or scheduling managers. I both observed this system and acted as an agent to change it. As the L&D team grew, it replicated a similar structure that I had seen in other organisations, with some minor variations.

The global head of L&D reported to the chief talent officer (in some organisations, this role reports to the head of HR), and had five direct reports: the three learning leads for each region – EMEA, the Americas and Asia-Pac – in addition to the head of curriculum and head of learning operations.



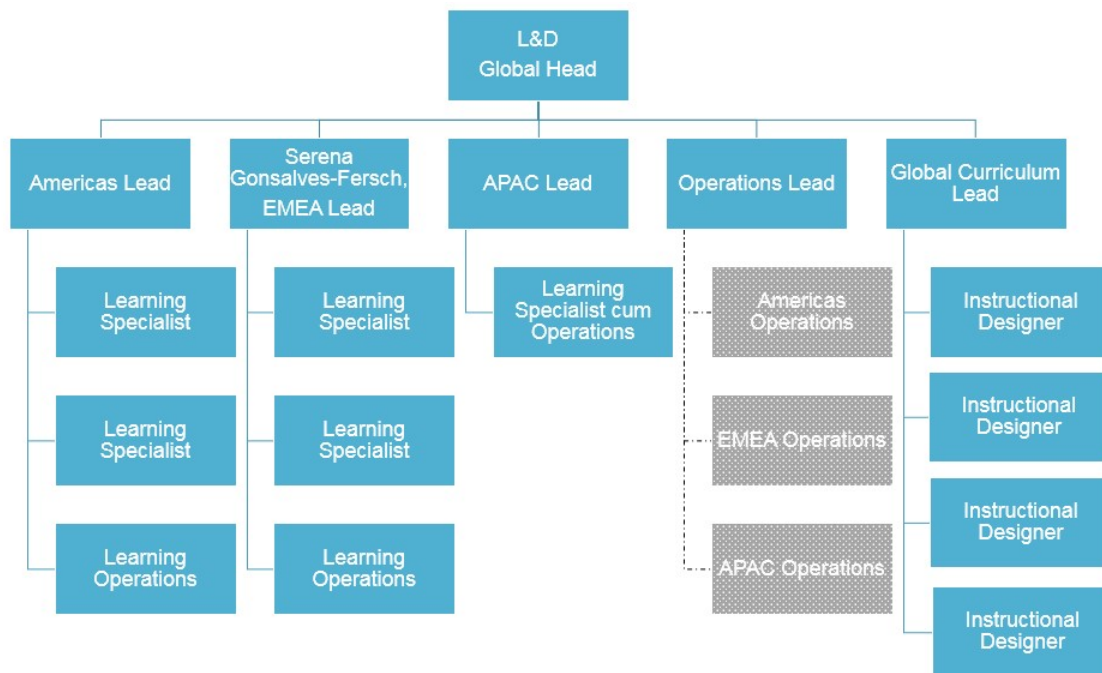


Figure 10: L&D Organisation Structure at former organisation.

The firm provides professional services, including leadership advisory services and executive placement at the C-suite level and senior-executive roles directly beneath them. Given the firm's area of operation and expected pace of change, the structure met its needs at the time.

The learning function was created to foster a globally unified learning strategy, approach and global curriculum, and consolidate country-specific 'cottage industries' of training that had cropped up over the years to address knowledge gaps and on-board new hires. In the view of the firm's leadership, the lack of a knowledge structure and centrally managed processes undermined the transfer of knowledge, especially during employee transitions. As the organisation evolved through rapid recruitment and acquisitions, it had no consistent teaching of global methodologies and best practice.



The firm had operated for 60 years without a qualified head of learning, so the newly introduced L&D function represented a significant shift in corporate strategy, as well as a signal to clients and investors of the company's firm belief in talent development as a strategic driver of longer-term corporate performance.

As I interacted with a wider community of practice and observed our firm's 'accelerated organisation' clients, who might or might not have an L&D function, I wondered what the structure of learning would look like in the future. The future role of the L&D function and impact of digitisation and technology were common topics of debate in the L&D field, with a general consensus that organisational structures were changing rapidly and the need L&D to raise its game to ensure its future relevance.

As Quinn (2014) posits, in a rapidly changing world, organisations' main differentiating factor will be continuous innovation, which in turn requires continuous learning. In his view, corporate L&D is on a path to extinction if organisations fail to recognise this. In a similar vein, Cross (2012) warns organisations of the dangers of short-term thinking and how it prevents them from adequately preparing for large-scale, systemic change. As he observes, many CLOs are 'so busy taking care of today's business that they spend little time preparing for the future'.

Performance and productivity are the result of continuous corporate learning within organisations. In this regard, L&D can only make an impact by understanding the business and future growth plans, and developing an L&D strategy that adequately prepares its workforce. Only then can



businesses adapt the way they approach learning for their people (Lancaster, 2018). Organisational change, technological change and a marked focus on the employee are recurring themes in corporate learning research.

Following on from my earlier position, studies to date largely focus on individual performance, with little recognition that results are produced by groups of people working towards a common goal, and that relationships are more important than individual smarts. According to McKinsey, today's business environment requires far greater organisational responsiveness and agility, and the ability to build workforce capability at a much faster rate (Bachmann, Skerritt and McNally, 2021).

L&D has greatly evolved over the last 30 years, moving from directed teaching towards facilitated and self-paced learning. This shift prompted the need for more dynamic learning platforms, while embedding the concept of a growth mindset (Dweck, 2012) and personal and professional growth (Salopek, 2016). Despite these trends, 70% of L&D teams are failing to improve business productivity according to the 2015 *Towards Maturity* benchmarking survey of 600 learning leaders.

As an L&D professional, I find the current state of affairs very troubling. Will future organisations consider a managed learning function if L&D is not sufficiently aligned to their changing needs? Where is L&D excelling and where does it need to improve? What and how does continuous learning impact me as an L&D professional? Is my skillset and experience relevant in a rapidly altered business world? In this sense, it was critical to view my



field and function beyond my organisational context when I commenced this DProf on the future of my profession.

In 2019, shortly after presenting my Proposal Approval Panel, I was hired as the global head of learning for a technology consulting firm. At the time, both the role and the firm were perfectly suited to the context of my research. The firm was a start-up cloud solutions provider in hyper-growth that had expanded rapidly through acquisition and large-scale hiring. The stop-gap L&D function was established when the firm had 50 employees and no longer worked for its current workforce of 1,200, nor aligned with its future plans to expand to 2,500 and float an IPO in the course of a year. Recognising this shortcoming, the new CPO and CEO hired me on a year's contract to future-proof the learning function. The views of the CPO, both in the context of the firm and on introducing L&D in similar technology accelerating start-up organisations, are included in the findings of this research.

After assessing the current situation through stakeholder interviews and analysis of current offerings, combined with findings from the last Employee Engagement Survey and exit interviews, I identified four immediate priorities for the L&D function:

- A better on-boarding programme to reduce time from induction into the firm to productivity
- A more robust learning system to access and capture learning, and integrate it with external technology learning platforms
- A career pathing framework



- Leadership training, with an emphasis on new manager training

I had a two-member team and a year to achieve these objectives.

My first reflection on my role in a tech-driven accelerating organisation was the sharp contrast to my previous traditional L&D role. In both places, I was establishing a cross-country learning function, but the similarities stopped there. In the former, it was about making the case for L&D in a 60-year-old business, which had essentially existed for decades without it. My job focused on stakeholder management and the rollout of role-specific learning, including people-skills programmes targeted at senior leadership and high-potentials. L&D had to continue to train on the firm's bespoke technology and new products offered under the new operating model. The means of delivery were mostly traditional, usually face-to-face and sometimes live WebEx. E-learning consisted of recordings or bite-sized training-related FAQs.

My situatedness (Costley, Elliott, and Gibbs, 2010) was dramatically different at this organisation. The pace of change in the firm demanded an accelerated approach from the L&D team, with no need to justify the function's existence and a strong emphasis on showing 'value' as defined by the business. From the identification of need to the conversion to solution, initiatives moved at a faster pace than before, and the interaction with the business at both user and stakeholder levels was continuous. In my professional life, this was the first time my career and research truly met, although the demands of my role offered little space for reflection. A sentiment I often shared regarding my time of 'living my life in inquiry'



(Marshall, 2016) was, 'Whilst living my research, I had no time to reflect or write about it. Now that I have both the time to reflect and write, I find myself not living it the same way'.

Within a month of joining, I was asked to assume the recruitment function. I became the head of a larger and single portfolio of talent that included talent acquisition (recruitment) and talent development (L&D). Without a lead, the recruitment team had grown exponentially, and the business needed a more structured approach to hiring and developing the firm's talent. This was an important learning for me: the interconnecting of what would be two separate systems in larger or traditional organisations, and the introduction of the build versus buy conversation when striving to align people to business strategy. I knew inherently that, in newer and accelerating organisations, L&D could not simply exist as a custodian of content, divorced from workforce planning. And for the first time, I recognised this was my opportunity not only to live it, but to shape it for the firm of the future.

The following graphs reflect the structure of the overall people team, although the numbers in roles changed over the course of the year:



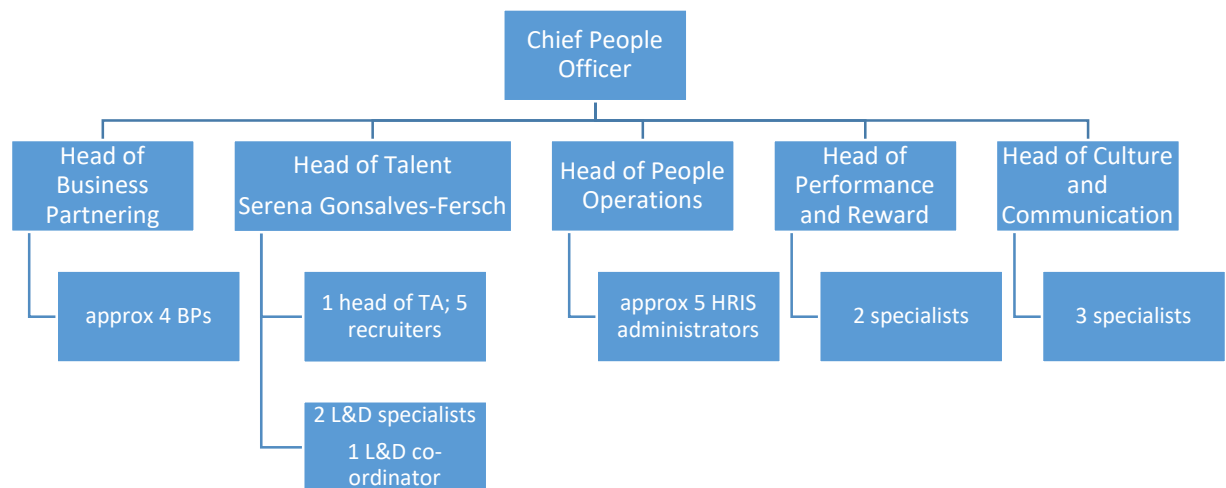


Figure 11 Accelerating Firm People Org Structure

The first months were a whirlwind of activities and achievements. It is safe to say that business strategy and direction change often in a hyper growth start-up, as does leadership and team size. For this reason, the role of bringing in employees to the firm and developing and deploying them must be equally agile. To this end, I set up a task force – sales, delivery, resourcing and talent – to define our selling propositions and projects; assess if the firm had the necessary skills in house to deliver on them, and if not, if it should hire more or different profiles, or develop these capabilities in house; and define timeframes for each stage.

Although a large-scale project, it seemed like a straightforward, logical approach. That said, L&D is known for its reputation as ‘order takers’ (Yates, 2016) for specific training interventions and courses, a term cited often in my interviews with L&D professionals and thought leaders. In many organisations, the L&D function is perceived as sitting separate from the daily workings of the business, with interactions viewed an opportunity cost for the workforce away from their day jobs as pointed out by interviewee



T59. The imperative for L&D to be more aligned to business performance was not a new concept, as evidenced in reflections during my previous role. Could this be one possible way of how that need is addressed in a start-up?

My tenure at the firm ended in early 2020. The company had suffered significant upheaval, resulting in a change of leadership and drastic reduction of its workforce to 650 people. At this stage, the priority was to work with current systems and steer the firm to profitability. During my time there, my team and I laid the foundations to sustain the talent function through several high-impact initiatives:

- Implementation of a new LMS and requirements definition with a provider for a career-pathing and talent management system.
- Delivery of employee development programmes that engage the workforce and address its core learning needs, with focus on developing client-facing technical capabilities in cloud technologies and creating the framework for technical-skills paths.
- Roll-out of a management development path and programmes for a range of roles, including new managers, high-potential future leaders and top-tier executives.
- Redefinition of the pre-boarding, onboarding and job requisition processes to ensure the firm was hiring at the right time and making appropriate build-versus-buy decisions for talent.

Another area to ensure business alignment was through the business partnering team and performance management cycle. It baffled me that



performance management included individual development plans, but that these were not fed back to the L&D team, and didn't directly inform future development choices. My recommendation was to ensure that performance and development was tied into learning needs analysis and employee development by implementing development planning on the Human Resources Information System. The sum of these development needs would then be presented back to the business, and L&D would work with them to ensure that future learning interventions directly targeted both business strategy and individual areas of need.

In my 20-year career, this was my shortest tenure at an organisation, which I selected as my research prototype of a tech-driven accelerating firm. I accepted the position to form part of the context, show how a different L&D vision could better support hyper-growth organisations and create a different experience. As positive takeaways, I learned that closer collaboration between acquisition and development of people (buy versus build) was integral to workforce planning at pace. I learned the importance of flexible organisation design to support a balance between needed hierarchy and agile career progression.

On the negative side, I also observed the negative fallout when important policies around business strategy, expansion and subsequent spend are not addressed in a timely or structured manner. I had always firmly believed that business strategy should be talent management's anchor and North Star, and a lack thereof would severely undercut any successful people strategy. The 'big assumption' I started out with – that L&D could be an



effective partner to guide a firm through successful hyper-growth – was challenged and needed to be redefined.

My perspective shifted dramatically. The solutions I put in place during my short time at the firm would provide a foundation and a strong holding pattern. Once the firm addressed its fundamental value proposition and business strategy, the talent strategy could be built further upon. When I left, people development needed to take a back seat beyond compliance and mandatory learning since the firm's primary aim had moved from growth to achieving stability and survival.

This experience added key questions to my thinking: 'When is people development not enough?' and 'What role should the L&D function play when hyper growth and acceleration turns into a decline and deceleration?' My reflections on these issues followed me through and are reflected at various points in this research project.

#### [Covid Environmental Context and Research Impact:](#)

2020 was a year of worldwide turmoil, with the pandemic claiming millions of lives (Figure 12), straining global healthcare systems and causing 'widespread economic disruption at an unprecedented speed and scale' (Baldwin & Weder di Mauro, 2020).



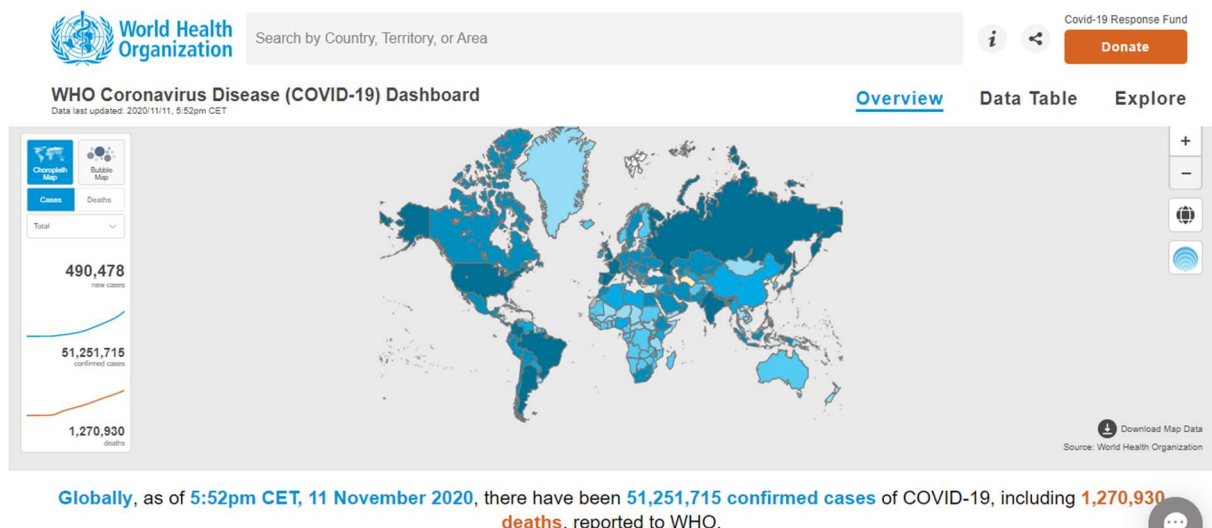


Figure 12 Covid Impact

My personal context in the pandemic greatly impacted my research methodology and presence in the industry, as my contract with CR had ended two months before the COVID-19 outbreak. With a new role hard to come by in the ensuing economic downturn, I found myself a full-time researcher and witness to the great changes unfolding in corporate learning during this period (Figure 15). For the first time, I was an observer of the action, not a practitioner. As I transitioned back into the workforce at the end of 2020, these changes in roles became integrated and gave me a richer and cross-discipline perspective.

In the 'Methodology' chapter, I delve into greater detail on how becoming a full-time researcher impacted the choice and direction of my qualitative research. Interviewee C13 touched upon my context accurately: *'One of the fatal dangers is that the learning and development industry itself will become redundant. L&D won't be guided by an L&D person, it will be guided by ourselves, where we're exploring outside the company'*.



In the same way as I sought my knowledge, skills and development outside the organisation through my DProf programme, so would the learners of the present and the future. The changes to L&D triggered by the pandemic warranted its own section in this study.

COVID-19 provoked a paradigm shift in workplace culture, forcing many organisations to rapidly adjust in order to survive. As noted by Butterick and Charlwood (2021), learning delivery was radically transformed depending on organisations' critical challenges and opportunities, and degree of upheaval caused by the pandemic.

The shifts in learning and development mainly revolved around organisations embracing change while implementing new means of learning in the new digital era, in which face-to-face learning and in-person networking became impossible. In 2020, with an economic recession predicted, many businesses experienced dramatic changes such as business lockdowns and time curfews. Many of the learning and development plans were either revised, cancelled or postponed. Employees were either faced the risk of furlough or engaged in remote work from their homes.

Prior to the pandemic, research shows that many organisations were already willing to invest in e-learning platforms, so its outbreak only accelerated their plans. Digital decisions like virtual classrooms were increasingly adopted by learning and development professionals in the workplace, implying a shift in organisations to prioritise learning



technologies and technology-enabled delivery mechanisms to reach their users.

Technology became vital to imparting learning, including face-to-face learning delivered via the most suitable digital platforms. Several articles and blog posts by organisations and educational institutes validate the efficacy of virtual classrooms for learning, development and delivering training needs, thus promoting improvement (Rickard et al., 2021). The adoption of virtual learning was further accelerated as employees shifted overnight to remote working environments.

Virtual programs have been linked to various benefits, including higher satisfaction for learners thanks to a more tailored learning experience, the result of AI and stronger algorithms, as well as better time management and reduced costs (Koksal, 2020). Providers like ReadyTech created the graphic below to show the increased uptake of virtual learning and its numerous advantages in the pandemic.







some of which were simple uploads of offline materials to an online platform. Online learning also reinforced the fundamentally flawed assumption that L&D teaches individuals and leads to increased personal knowing and improved group performance.

In many organisations, the L&D function was a victim of budget cuts during COVID-19, with the uncertain financial landscape and the unpreparedness of L&D professionals to navigate the unforeseen workplace shifts like remote work both serving as contributing factors (Carlier, 2021). Budget constraints meant organisations had to accomplish more with the little they had in terms of fulfilling learning and development amidst an already challenging context.

The acceleration to more virtual and asynchronous online learning were heralded by experts as the long-awaited and long overdue catalyst to learning innovation (Howlett, 2020). Like every other part of the business, the L&D function had to prepare for 'The Big Reset' (Bersin, 2021) of work, leadership and human resources. The crucial need for L&D practitioners to better understand overall business priorities and reinforce learning solutions to bolster corporate performance became even more evident during the pandemic.

COVID-19 also contributed to downward and upward shifts in organisational approaches to learning and development. These included a drastic reduction in apprenticeships, in-house development programs, job rotations and external workshop conferences. Alternatively, organisations



had to swiftly adapt to various techniques to boost connectivity in the learning culture. These included the adaption of reverse mentoring techniques, whereby younger, more digitally skilled professionals shared their knowledge with senior leaders less versed in technology (Marcinkus Murphy, 2012).

The pandemic underscore the critical role of L&D professionals in supporting organisational readiness and empowering the workforce. Their means for improving agility include re-skilling and redeployment of employees due to changing roles and automation impacts, thus increasing the need for L&D professionals to also be innovative, out-of-the-box thinkers.

The retailer Ann Summers offered a prime example of L&D innovation. Before the pandemic, the company sold its lingerie products in shops and through parties in people's homes. When pandemic restrictions made the latter impossible, its L&D director Sarah Ratcliffe recreated the learning offering for their ambassador salesforce so they could run their sessions online, introducing new thinking around live online learning, social learning and resources. Her innovative approach led to stellar results for the brand despite lockdown restrictions, and an increase in the pool of brand ambassadors from 4,000 to 18,000, who now who now run events virtually (Learning Live TV, 2020). Throughout the transition, Ratcliffe ensured L&D functions had sufficient leadership support and formed part of the strategy conversation in order to identify skills gaps and create sustainable future solutions.



Another example of L&D agility was seen at Co-op, a group that includes both supermarkets and funeral services. In the early days of the pandemic, the supermarket business grappled with the initial disruption of 'panic buying' and higher demand, as people relied completely on local shops due to lockdown restrictions. In parallel, pandemic-related deaths also created higher demand for their Funeralcare division. The 2021 Learning and Skills at Work Survey by CIPD and Accenture offered these insights:

"[...] they had to grow their workforce rapidly, filling 5,000 vacancies to meet demand, as well as any gaps created by employees needing to shield or isolate, all while ensuring that colleagues are kept safe. The L&D team adapted their approach quickly to onboard new colleagues. Working with the business, they targeted their approach to e-learning, focusing on providing colleagues with appropriate training 'just-in-time'."

In terms of its Funeralcare business, L&D collaborated closely with top leadership to ensure the right training to train new hires as quickly as possible, many of whom had never worked in the sector before. Over an intense two-week period, the team designed and developed e-learning modules to quickly onboard new colleagues, breaking through technology-related barriers and challenging in-person training as the gold standard.

This sharp move to online/e-learning i.e. more self-paced and virtual with more interaction, e.g. live online learning meant that many firms needed to develop new learning infrastructures to support redeployment and re-



skilling of staff. In 2020, a Fosway Group survey found that digital learning resources and new training techniques had become priorities for over 80% of organisational decision makers. (Figure 14). The same Learning and Skills at Work survey put the figure at 70% of organisational leaders who reported that their use of digital learning solutions had increased during the first 12 months of the pandemic, with 36% reporting an increase in L&D technology investments (CIPD, 2021).

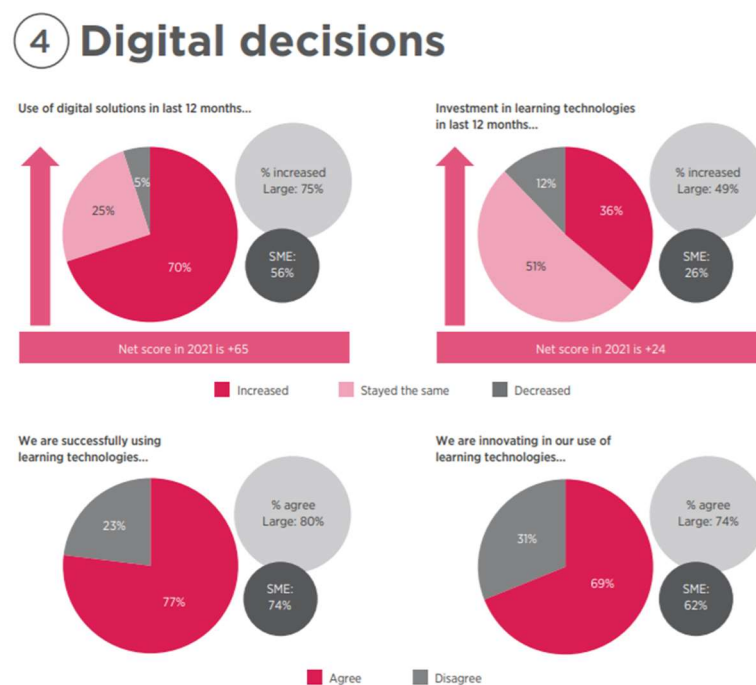


Figure 14: Increase in Use of Digital Learning Tech Post Pandemic.

So, what does the future hold? Will the current changes persist regarding workforce location, digital learning and reduced dependency on external consultants? According to research by Pugh et al. (2021), the future is highly unpredictable at present. In their study, they found that nearly 80% of organisations intended to normalise remote working, while the remaining 20% planned on having employees return to the office. Nonetheless, these



findings were deeply contested by Global Workforce Analytics (2020), which forecasted that only 25-30% of the U.S. workforce would work remotely one or more days a week after the pandemic, with the aims of reducing their carbon footprint and reducing costs.

Whilst the future role of the physical workspace remains unclear, there is general agreement in the literature that most organisations will offer their employees some form of hybrid or remote working option.

In their efforts to adapt to this new landscape while boosting workforce productivity, L&D functions will have to be flexible and innovative in their online methods. The number of L&D personnel and external consultants fell significantly during the pandemic because of strict guidelines stipulating face-to-face interactions and the need to cut organisational costs. Most organisations chose to adopt different and cheaper methods to enhance learning and development despite the challenge of fewer L&D personnel.

In conclusion, many organisations were unprepared at the onset of the pandemic and struggled to adapt to the crucial operational business shifts, prompting the need for swift mechanisms in L&D to bridge gaps in onboarding, compliance and teaching people how to function in role and organisation context. The learning and development function has been challenged to bring better means in the workplace and increase overall output, both in current and future business operations. Remote work and digital and virtual classrooms have emerged as the most significant advancements from the pandemic (Phillips, 2020).



From the above, it is clear to me that these are very L&D-centric changes focused primarily on the delivery mechanism. We have yet to see deep discussions on the impact of this change on adult learning, or L&D efforts to ensure learning is meaningfully connected to business objectives, while fostering future-focused capabilities such as nimbleness, flexibility, innovation and creativity.

At the outbreak of COVID-19, learning and development teams faced tremendous pressure to adapt learning content to online formats and react to overnight restrictions in mobility. L&D functions helped identify skill gaps in the workplace and quickly change tack to bolster productivity. Among the pandemic's key takeaways for L&D are (1) to remain focused on the future, (2) utilise the broader learning environment, (3) adopt strategies to 'build back better', (4) embrace digital innovation as a learning strategy.



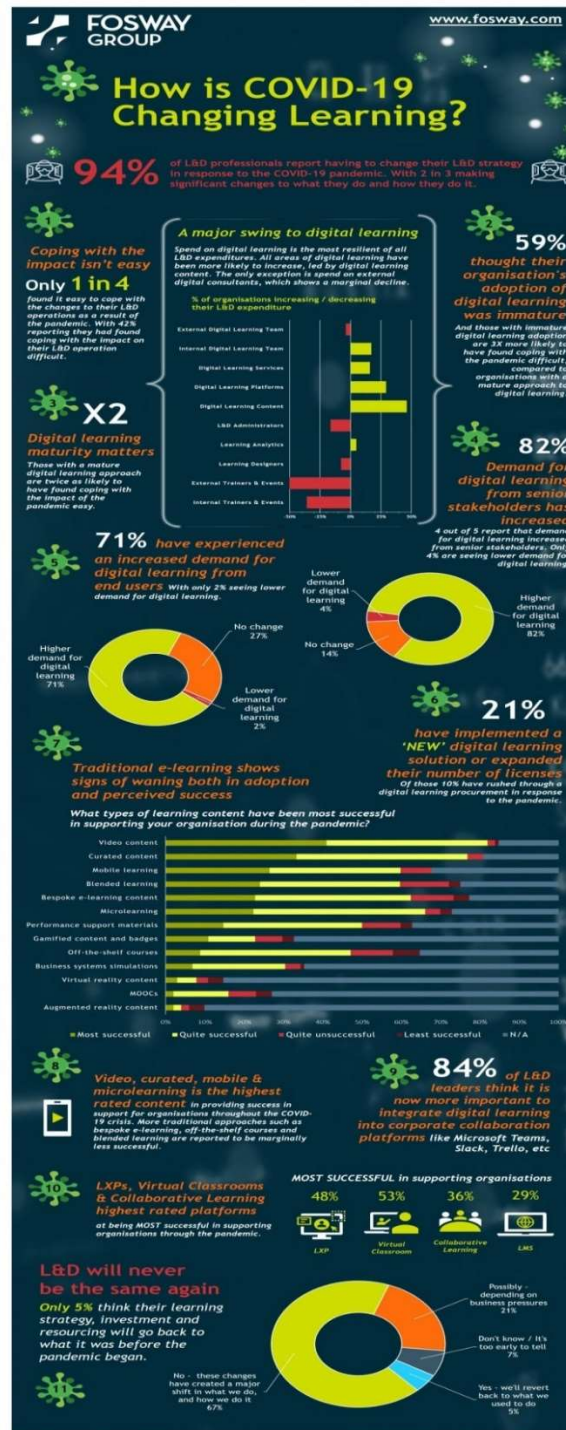


Figure 15 Fosway How Covid is Changing Learning

Preamble:

My research has entailed an analysis of what knowledge, skills and perspective the workforce of the future needs, how current structures are ill-equipped to support them, and how these need to evolve in the specific



context of hyper-growth and accelerating organisations. I have used my experience of creating L&D functions from the ground up, and leveraged the key learnings that can be applied to the accelerating businesses.

The premise of my research is that the L&D function and its structure, role and practices may need to fundamentally transform to suit the needs of emerging businesses. In this regard, I have identified the concrete functional areas where this change is needed. I have also examined the skills and current remit of learning professionals, and examined if L&D will be required in accelerated organisations of the future. In this sense, I believe my findings are the starting point of deeper research, specifically on formal and informal L&D education. My research may contribute to a complete rethink of the critical skills a learning professional should espouse to adequately serve global organisations in the future.

Often over the course of 2020, I pondered whether I am indeed part of the context or merely an observer and reporter of the change. I continue to stipulate that studying the future of my job and my profession, and perhaps helping shape it and create a vision for its ongoing existence, is my context.



### 3. Literature Review: Knowledge Landscape

Since the field of learning and development is vast, my literature review focuses on the areas most relevant to my research: strategic L&D and its role and offerings, and their intersection with new and rapidly growing tech organisations. In parallel, I reviewed knowledge on L&D offerings with theory- and evidence-based foundations as they pertain to my research aims:

- 1) Identify the conditions under which the introduction of L&D services or formalising an L&D function could effectively drive further growth and productivity within an accelerating organisation.
- 2) Specify the set of capabilities likely to be needed by L&D professionals operating in this environment.

In order to guarantee an unbiased and independent view of the broad realm of corporate learning, I omitted publications commissioned by training and EdTech providers, as well as those relating to technical tools used to build or design L&D content and systems.

Before structuring my review, I start with some general observations:

- Most works on corporate L&D have been authored by industry vendors or professionals working in this space. Whilst there are myriad publications on human resources, organisation development, talent management and the future of work, corporate L&D often seems markedly absent on the larger business agenda. Even leaders



who cite people development as a core strategic and growth driver rarely underscore the L&D function as the owner or lynchpin to its implementation.

- Corresponding research on critical L&D themes are primarily based on surveys from newly appointed CEOs, COOs and CHROs. I find this is ironic considering that L&D exists for the concrete aim of developing people for business value and growth.

These appraisals typically reflect C-suite expectations of the learning function, whilst offering little insight on the necessary conditions for its introduction and role vis-à-vis business value and growth. Where possible, I have included books that mention the L&D function and its role within the wider organisation.

- Both academic educationists and corporate L&D operate in the realm of adult learning, yet I was unable to find significant crossover literature. Those found have been included in my review.

I believe this scarcity of intersectional literature might point to a larger truth: whilst how adults learn in organisational settings derives from scientific theory, the L&D function itself and its definition of best practice is undeniably socially constructed. For this reason, my literature review centres more on educationist and organisation development authors who write about corporate L&D and the theories that effectively traversed, or ought to traverse, the corporate L&D space.



## Defining Learning in the Context of This Literature Review

Learning is an exceptionally broad domain with a diversity of definitions and theories. For the purposes of my research, I concentrate on two key schools of thought and characteristics that I believe reflect how learning is defined in organisations.

- **Constructivist learning:** learners learn from explorative approaches, either from each other or through problem-based methods.
- **Direct or explicit instruction:** the instructor provides content, information and intentional design for the learner to get to know and experience the content.

Under the constructivist learning theory, students learn by fitting new information together with what they already know, based on the notion that 'learners are active participants in their learning journey; knowledge is constructed based on experiences. As events occur, each person reflects on their experience and incorporates the new ideas with their prior knowledge' (Kurt, 2021).

According to the John Dewey theory, people more easily acquire knowledge through experiential learning by actively engaging with the material rather than passively listening to lectures or memorising facts. In his model, 'the learner occupies the top position rather than the teacher and gains by interaction with his or her own environment, and in doing so understands his/her own characteristics and perspectives'. (Ültanır, 2012: 205). This approach involves peer to



peer, social, informal, design thinking and organisation development. As Woolfolk (1993) observed, learning is not a passive reception of teaching, but rather active mental work.

Among the modalities of experiential learning is action learning, a collaborative problem-solving process that groups people in small teams to analyse and explore potential solutions to real-life challenges. Pioneered by Reginald Revans (1998) and further developed by Mike Pedlar, action learning is strongly grounded on the practical and moral relevance of personal involvement in action and learning to solve social and organisational problems (Szabla *et al.*, 2017). Whilst action learning has proven effective in many organisational contexts, its emphasis on the individual learner makes it less relevant for my study and its focus on L&D strategy.

Also related is the theory of concept of connectivism, defined as the generation of knowledge stemming from the connections between entities and how changes in one affects the other. Under this construct, learning is the natural offshoot when these connections grow, develop, change or strengthen.

Building on this concept, Siemens and Downes (2009) developed the connectivism learning theory to highlight the role of technology in the learning process, which begins when the individual uses technology to solve a problem, such as doing an online query, texting a friend or searching for social media content (Duke, 2022). This theory ties into the



Coomey and Stephenson learning paradigm as well as communities of practice, both of which are explored in greater detail later in this chapter.

In my view, constructivist learning is a valid approach if learners are already domain experts or have related experience. If this is not the case, learners can easily become frustrated or acquire the wrong concepts or behaviours. For their part, instructors have difficulty discerning if they actually mastered the lesson or simply got lucky. In this review, constructivist learning is the primary area of focus, as I believe the fast pace of change in accelerating organisations' business and technology will require learners to better understand their business context and take greater responsibility for their development. The opposite is direct or explicit instruction. In their paper 'Putting Students on the Path to Learning', Clark, Kirschner and Sweller (2012) stipulate that only experts can thrive in a constructivist environment with minimal guidance, and that the ideal learning environments for novices entails full, explicit instructional guidance. I have also found this the case in my practice, with direct instruction especially useful to impart a foundation for novel learners before they experiment and explore its real-life applications.

Direct learning rests on the assumption that there exists a known and stable body of knowledge, that learning equates its acquisition, and that testing demonstrates if it has been retained, although with no explicit expectation that new knowledge will be successfully translated into real-world action under conditions of complexity and stress. The



facilitator needs to determine when to let go and hand over knowledge co-creation for exploration and experiential learning.

Direct instruction can be over-controlling and tedious for more expert learners. That said, it is beneficial for compliance-based learning and safety training, where a uniformity of understanding and dispersal is needed across the organisation.

In the context of future organisations, a constructivist approach to the firm building knowledge and collaboratively learning helps spark innovation and a future-forward approach to building individual skills through individual choice in the context of their work environment.

#### Structure

I used the Coomey and Stephenson Learning paradigm as a general structuring model to show how the various elements of my literature fit across the spectrum of activities in L&D. Though initially designed to review the educational strategies of e-learning offerings, this model, in my view, is also applicable on a macro level for the broad learning strategies underpinning strategic L&D approaches. The model is represented in quadrants, although I view it in two vertical hemispheres. Based on my experience in the field, L&D today primarily operates in the top and bottom left quadrants i.e., the left hemisphere.



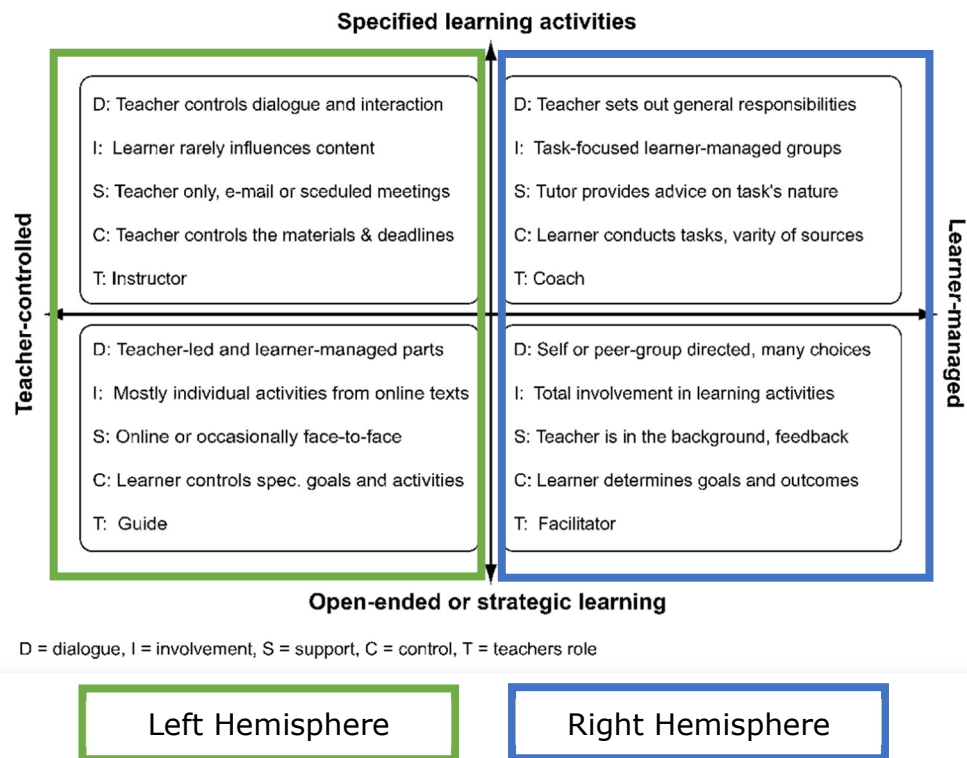


Figure 16 Coomey and Stephenson Teaching / Learning Paradigm

Whilst here, I focus briefly on educationalists in corporate L&D and thought leaders who aspire to improve L&D's here and now – from the left hemisphere of the Teaching and Learning Paradigm which is where most L&D investment lies.

In this section, I also cover industry research by institutes, vendors and consortiums who go out to the field, interview and survey learning, HR and business leaders. Though this sits in the first quadrant, the reports reflect the mood, understanding and concerns of people managers in the current landscape.

In order to show future organisations and the new workforce, I move from left hemisphere to the right, where there is greater learner control.



According to Prawat (1992) and later Jonassen (1999), the constructivist quadrant (upper right) can successfully promote deep learning impacts and long-term knowledge retention by stressing active engagement and social interaction. The final lower-right quadrant of collaborative learning also emphasises active engagement and has been proven effective in helping to cultivate critical thinking skills and higher-order reasoning (Slavin, 1995; Johnson & Johnson, 1994), both essential to preparing workers for the future.

I then use the principles of organisational development – moving away from L&D, which focuses on teaching skills to people – to an organisation learning lens. I look for answers to the future of L&D in organisational development and seek to use the literature to understand what organisational learning is all about.

My premise is that the L&D function has undermined its strategic relevance for the future workforce by focusing its energy, time and money in the left quadrants, failing to align its strategic positioning to the emergent needs of a modern workforce. I further suggest that L&D might revert this situation by integrating principles of organisational development relating to organisational performance.

I will move between the principles of the left quadrants – evidence-based instructional design, learning technology and learning evaluation for impact – and contend that these are underpinned by a performance consulting and performance improvement philosophy. Then moving to the right hemisphere, my areas of focus are systems



thinking, learning organisations and the qualities needed to foster these approaches in future organisations, all mapped to the Coomey and Stephenson model.

These areas are already widely discussed by corporate L&D and, in my view, have rigour to be future-proof. There are also crossover concepts from wider organisational development that, if applied correctly, may have validity for accelerating organisations and their learners of tomorrow.

I conclude with a section on the future organisation: The Future of Work and Its Impacts on Society and Organisations. I look briefly at where society is going and how its direction influences the human world of work and L&D by highlighting authors who explore how the world of work will impact the jobs of today and tomorrow.

#### [The Coomey and Stephenson Model](#)

I have used the Coomey and Stephenson model (2001) which describes the four different phases of the e-learning process. I chose Jonsson's (2005) interpretation of the model as it closely relates to the four quadrants of the original model, and to underscore that most L&D investment and literature plays in the left quadrants. In my opinion, future organisations and the future workforce will desire greater learner control and gravitate toward the right hemisphere. That said, a constant balancing act between the two hemispheres will be critical to driving individual and business growth.



Although interpreted differently by various scholars, Jonsson interprets its four phases as follows:

- Planning phase: low learner activity and minimal social interaction, as depicted in the upper-left traditional instruction quadrant of the Coomey and Stephenson model. As they acquire basic knowledge and skills, learners are passive vessels of information.

This is where most corporate L&D is today. L&D peers and practitioners will argue that there is learner engagement, both in feedback for learning, and in user-generated content. Whilst accurate, the ultimate responsibility for the creation, hosting, delivery and evaluation of 'what is taught in an organisation' sits with L&D – and this is where most of L&D's investment is made.

- Construction phase: this phase is depicted in the lower left quadrant, with instructors acting as guides to facilitate active engagement and interaction amongst learners and help them acquire and apply knowledge on more complex problems. This approach is characterised by a high degree of collaboration and social interaction amongst learners, who are actively involved in building knowledge whilst instructors are more in the background.

Through this literature review, I aim to show that in accelerating organisations, there needs to be a looser grip of the 'ownership' of what to learn and how it applies to one's job and the business in order to promote employee and organisational development.



- Interaction phase: the upper-right quadrant is where learners begin to apply their newly acquired knowledge to real-world scenarios and interact more with each other and the instructor. In this phase, discussion, debate and the exchange of ideas receive greater emphasis. This is referred to as didactic instruction in the Coomey and Stephenson model (low activity, high interaction), in which the teacher acts as a coach, serving as the primary source of information yet encouraging more interaction amongst learners through discussion, debate and other techniques.

In organisations, interaction exists in the form of case studies, knowledge groups or communities of practice. First proposed by Lave and Wenger (1991) and further developed in subsequent years, a community of practice (CoP) is a group of people united by a shared concern or passion for something they do who learn how to do it better through regular interactions. As a socially constructed process, CoPs are undergirded by connectivism, with learning occurring when three elements are present: a common domain of interest, a community of people and regular practice as opposed to mere interest. Whilst learning is a consequence, it is not necessarily intentional in a community of practice, at least outside the organisational sphere. With regard to organisational learning, L&D may influence or take part in these interactions, but ownership (if it exists) occurs offline and within the groups. The subject-matter



expert would take on the role of the instructor in a more informal fashion.

- Evaluation phase: depicted in the lower right quadrant, learners create and evaluate their own learning and that of their peers by working both individually and in groups. Although similar to the collaborative learning quadrant of the Coomey and Stephenson model, there is less emphasis on collaboration and more on self-reflection and self-assessment, and instructors only provide guidance if needed.

In this quadrant, I seek to address the question of whose responsibility it is to deliver development in future organisations. Should firms buy talent, whilst individuals within the firm are responsible for their own talent build? Should L&D be no more than guides and facilitators, whilst the individuals living the context of productivity and delivery assume responsibility for 'what' they learn?

As mentioned earlier, the Coomey and Stephenson learning paradigm model was developed to classify claims regarding e-learning, but in its basic form, its implications are far wider. It helps demonstrate the basis of assertions regarding the power and place of informal learning, and constructs like the 70-20-10 model, referenced later in this thesis.

As Cairns and Al-Shahrani (2014) observe, the Coomey and Stephenson model supported other studies that categorised teaching conceptions as either student-centred or teacher-centred, yet Kember



(1997) took it a step further by adding sub-categories. In terms of student-centred learning, he differentiated between teaching as 'facilitating understanding' or 'promoting intellectual development or conceptual change'. In parallel, teacher-centred learning was broken down into teaching as 'relaying information' or as 'imparting structured knowledge'.

In this way, he added an intermediate concept between the two hemispheres of the original Coomey-Stephenson model – *teaching as student-teacher interaction* – to underscore teachers' conceptions of learning and how they relate to learning and teaching behaviours.

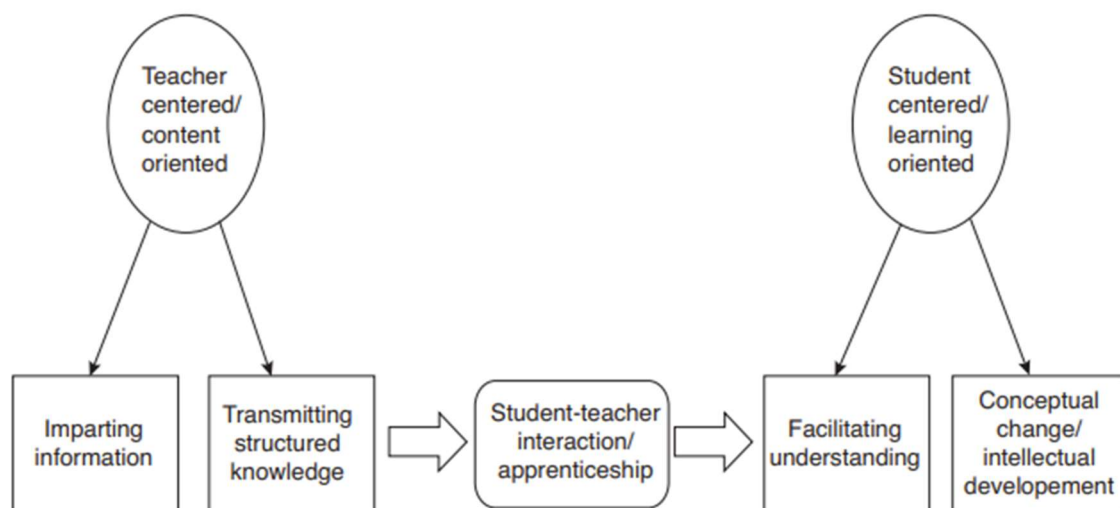


Figure 17 Conceptions of Teaching (Kember, 1997: 264)

According to Jonsson's case study, the Coomey and Stephenson model is applicable to e-learning, emphasising the importance of learner activity and social interaction in the delivery of high-impact learning experiences. I hope



to further build on this by moving from learner activity to *learner ownership*, and social interaction to *collaborative knowledge creation* within the organisational context. I utilise the concepts originally set out by Coomey and Stephenson and build upon them using organisational learning principles, to create a model of two hemispheres that accelerating organisations can use to understand and manage their learning journeys.

### L&D Focus Today

A quick overview of the literature shows where L&D focuses both its attention and investments. Sitting in the left hemisphere of the model, this category has the most literature by far – and given the most emphasis in the firm. It assumes that a learning function is best placed to understand the business needs, interpret these into structured learning and assume responsibility for its dissemination within the organisation.

At the same time, it posits that learning is largely about content acquisition based on approved 'best practices' and a concrete body of knowledge. Other models, however, highlight the dangers of a teacher-centred approach. According to Snowden's Cynefin framework, a 'best practice' approach is only appropriate when learning relates to simple systems with linear causality. This is clearly not the case for the fast-paced and often chaotic environments of accelerating tech-driven organisations.



This quadrant is not where I believe future firms will exclusively operate in the future, but rather where we are now. For this reason, it is worth exploring the following themes albeit briefly since it will serve as the baseline for future improvement in the L&D space:

- Learning design: how learning content is created and/or should be designed.
- Storage and presentation: how learning content should be presented in terms of platforms and technology, facilitation and delivery.
- Learning measurement: how learning effectiveness is measured via metrics to assess learning content effectiveness.

Literature focused on broader L&D explorations is also available: a generalist view including learning organisations and performance consulting. Though they straddle the aforementioned categories, they are more importantly the bridge between organisation development and L&D. I therefore deal with this crossover issue in a separate section.

#### [On Learning Design](#)

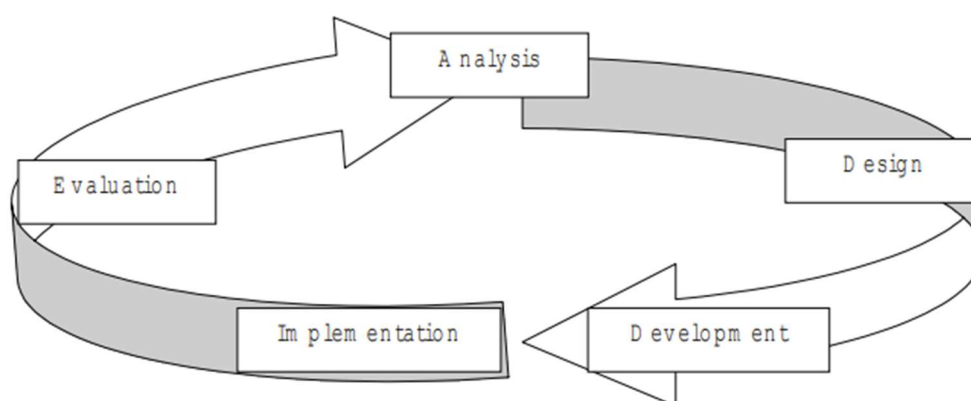
Most 'must-read-for-L&D' lists have a notably strong instructional design element for a simple reason: the mere nature of the title given to adult learning in organisational contexts – learning and development – inherently implies a focus on delivering learning to develop skills and capabilities in individuals in the organisation. L&D



equates to people's learning or training, with organisational development often seen as a function in itself. Most L&D departments, and therefore the corresponding literature, present learning and training as something you 'provide', 'do to' or deliver 'for' people.

In terms of the individual learner, the focus is on what and how they learn and consume learning content, and L&D's role in facilitating this process. To this end, significant efforts are dedicated to the design of the intervention: its presentation, optimal technology and user-engagement strategy, and how the combination thereof can promote knowledge and behavioural change and/or enhanced performance.

The last step of learning design is measuring this impact. Amongst corporate instructional designers, ADDIE – short for analyse, design, develop, implement and evaluate – is perhaps the most well-known model. It includes the five stages necessary to bring a learning intervention to life, which Peterson (2003) defines as follows:



*Figure 18 ADDIE Model of Instructional Design*



**Analyse:** Learners' needs are discerned by first assessing their current level of knowledge and ultimate learning objectives. To this end, instructors use standards and competencies as benchmarks to determine what students should know by the end of the learning intervention.

**Design:** This stage is spent on researching and planning to identify learning objectives, define how they will be fulfilled and optimal instructional strategies, media and methods.

**Develop:** Using the information collected in the first two stages, learning designers or instructors shift into a production mode to build a suitable learning offering.

**Implement:** The instructor's role intensifies in this stage, dedicated to analysing, redesigning and improving the product. The implementation phase requires multiple rounds of revisions to ensure a high-impact product, program or course.

**Evaluate:** Learning designers or instructors determine if the product or course has successfully addressed the problem or challenge, and met the stipulated learning objectives. This phase also entails making any necessary changes to improve its future delivery.

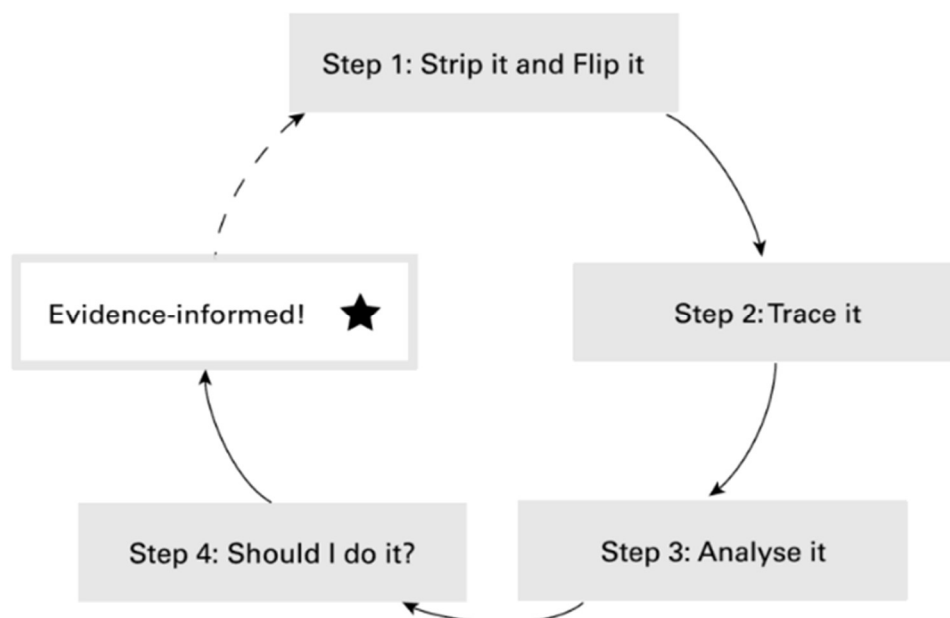
Whilst primarily a model for instructional design, an original, authoritative version of the ADDIE model has yet to be discovered (Molenda, 2015). For this reason, most L&D functions use the term beyond designing courses to broader L&D investment and content strategy. By way of example, the 'analysis' could occur during the firm's annual budget or annual performance review cycle, 'design' could refer to broader curriculums rather



than single interventions, and 'delivery' and 'implementation' often overlap in the purchase of content library or introduction of a learning platform.

Currently gathering momentum in L&D is the concept of evidence-based instructional design, with the use of learning analytics to inform the design of future learning interventions. According to Mangaroska and Giannakos (2019), learning analytics have the potential to clarify unexpected learning behaviours, detect efficacious learning patterns, identify misconceptions and misplaced effort, shed light on appropriate interventions and bolster users' awareness of their own actions and progress.

Meanwhile, Neelen and Kirschner (2020) underline the constraints of organisational learning environments in effectively replicating the same quality of evidence as clinical environments, describing evidence-informed learning design as follows:



*Figure 19 Steps in Evidence Informed Learning Design*



The first step in their model is stripping down and critically assessing the language used, and 'flipping it' to turn the argument upside down. For example, they quote Willingham and encourage learning designers to ask 'If I do X, there is a Y percent chance that Z will happen'. The following step is to trace the evidence by digging deeper and asking what kind of evidence support the claim. In the analysis phase, designers use evidence to boost their knowledge and expertise to explain the design decisions to the organisation.

These practices, whilst still on the left hemisphere of the Coomey and Stephenson model, attempt to tie individual and business performance to learning design. In my view, this is a better place to start than merely what looks good or serves to engage or entertain the employee.

As mentioned earlier, few academic educationalists transition to corporate L&D and analyse learning design for adults in organisations. In this regard, I centre on the core concepts underpinning their learning design rather than the means used – in other words, the theory and science in enhancing people's learning rather than learning delivery, ex. e-learning, augmented reality games or films. I look at the literature from two angles – how adults learn and systems design thinking.

The following section includes the main findings of some of these concepts.

#### *Instructional design: adult learning*

Though not standard practice in corporate L&D, I stipulate that knowing how adults learn is an important first step to understanding



instructional design. I have chosen to begin with Malcolm Knowles, a U.S. educator renowned for his contributions to adult learning theory. Creator of the term 'andragogy', he outlined three specific understandings of modes of learning engagement – pedagogy, andragogy and heutagogy – that are widely recognised in corporate L&D:

- **Pedagogy:** Derived from the Greek words *paid* (child) and *agogus* (leading), this term literally means the art and science of teaching children. Pedagogy considers learners as passive subjects who require the expert guidance of teachers in order to acquire knowledge. Under this construct, instructors control the learning environment, curriculum and assessment. According to Knowles, 'pedagogy is not appropriate for adult learners because it assumes that learners are dependent and need to be told what to learn, when to learn, and how to learn.' (1973: 43). In his view, pedagogy is appropriate for children since they lack the life experience and knowledge of adults.
- **Andragogy:** Used to describe the learner-centric teaching of adults, who are viewed as self-directed and autonomous individuals responsible for their own learning and only require the teacher for support and guidance. Knowles argues that 'andragogy is based on the assumption that adult learners are autonomous, self-directed, and have a wealth of life experience that can be drawn upon in the



learning process'. (1980: 43). This still sits in the left quadrants of the Coomey and Stephenson but acknowledges greater learner control.

In organisations, it still falls to the L&D function to determine learning needs and build and deliver the requisite learning interventions to address them by guiding learners to and through the content created. Most L&D design exists in the teacher controlled/task specific quadrant. The narrative is controlled by those designing and delivering the learning, and whilst every attempt is made to link to business strategy and address a skills gap, there are assumptions made on wider organisational productivity impact that cannot always be substantiated. According to Mitchell (2017), L&D is based on the following assumptions:

- ***Learners will do what they are told and change their behaviour.*** The author notes that 'courses tend to focus on telling people what to do and how to do it rather than engaging human curiosity through a process of discovery'. In his view, many L&D functions believe that telling people what to do rather than allowing them to 'learn their way through to a solution' is more cost effective, when in reality, the opposite is true.
- ***An academic approach suffices to develop practical skills.*** To help employees develop competencies like leadership, sales, emotional intelligence, communication and customer service,



Mitchell stresses the importance of context. In his view, imparting training out of context will lead to an even wider gap between training and workplace behaviour.

- ***Learners will remember and apply the course content.***

Many training courses convey too much information in too little time, which impedes the learning process.

- ***All learners are the same.*** In Mitchell's view, this assumption largely contributes to the misalignment between training and workplace behaviour. Learners reflect an array of individual characteristics and don't absorb knowledge in the same way, which has important implications in the training's content, style, pace, presentation and other dimensions.

According to Mitchell, these assumptions lead L&D functions to overlook empirical findings on adult learning and build trainings with the wrong methodologies. The effective transfer of training to enhanced organisational performance is consequently undermined.

In large part, instructional design seems to draw upon behaviourism learning theory, based on the concept of stimulus-response and a core emphasis on behavioural outcomes. Knowledge is projected onto the learner, who has less instructional control as a result. As Cooper (1993) observes, behaviourist learning strategies create highly structured environments and are more beneficial for lower-ability learners.



However, the organisations of today and tomorrow will require greater learner control to adapt to a faster pace of growth and more highly skilled employees. As interviewee C63 remarks, 'Are smaller organisations better off not teaching people how to research and study for themselves, rather than trying to design a one-size-fits-all and pretend it's not and shove it at people, which is largely what they do'.

- **Heutagogy:** this term refers to the teaching of self-determined learners, who are self-directed and assume responsibility for their own learning, with the instructor acting as a facilitator or guide. In this approach, the teacher and the learner co-create the curriculum and assess learning outcomes based in the learner's self-reflection. Knowles argues that heutagogy assumes self-determined learners can effectively take responsibility for their own learning and 'create their own learning pathways' (1990: 13). This approach is appropriate for highly motivated and self-directed learners.

In their article on the interplay between heutagogy and complexity theory, Hase and Kenyon (2007) say heutagogy is useful to facilitate learning and development in complex organisational systems, arguing its suitability for organisations in constant states of flux since it emphasises self-determined learning and the ability to learn from experience.

In my view, self-directed learning is a valid approach for promoting continuous learning, development and change in accelerating



organisations, whilst providing a framework for a different learning design. In young organisations, however, direct instruction is also relevant, particularly for recent university graduates, new leaders and compliance-related training. It can perhaps be supplemented with supporting initiatives like coaching and mentoring to help people make sense of their experience.

Blaschke and Hase (2016) have done extensive research into the theory of heutagogy and its implications for future learners. In their book chapter in *The Future of Ubiquitous Learning* edited by Gros, Kinshuk and Maina, they believe a revolution is under way in learning and education driven by the absence of barriers to acquiring knowledge and skills, and the dramatic shift in the requisite skills to become an effective learner, from passive recipient to analyst and synthesiser. Drawing from their work with CEOs in the early 2000s, they call for a system that fosters lifelong learners with a well-rounded skillset to navigate times of rapid change and encourages a strong desire to learn.

This approach stands in sharp contrast to traditional educational and training systems developed during the industrial revolution, which continue to drive educational policy today. By emphasising standardisation and performance, this prevailing model impedes learning, innovation and creativity and fails to prepare learners to navigate the challenges of the twenty-first century.



By integrating more heutagogy-based learning in alignment with organisational needs and decreasing the focus on knowledge and skill acquisition, corporate L&D can play an enormous role in promoting organisational learning. In this regard, the ability of the L&D function to balance self-directed learning with guidance and facilitated learning will be key to driving organisational development.

#### *L&D theories from a practitioner's perspective*

Based on my 20-plus years of experience in corporate L&D, I would posit that most instructional designers and creators of e-learning or other tech media formats have little or no knowledge of the aforementioned theories, and if they did, would not necessarily refer to them whilst designing learning interventions. More importantly, all assume that learning is something that L&D creates, provides and 'does' to other people, rather than something collectively created within networks by people engaged within a common purpose.

Later in this chapter and in my findings, I continue to question the premise that learning only happens for people on the receiving end of a planned intervention from an organised source, and explore how the history of informal learning and the 70-20-10 development model created by McCall, Lombardo and Eichinger (1996) suggests otherwise.

#### *On Learning Delivery*

After deciding which learning solution to build, the next discussion centres on its building blocks: the systems used (e-learning or



asynchronous), hosting platform, dissemination tools and resources to encourage audiences to engage with and complete it. Naturally, there is overlap between the design and delivery – you make decisions on the latter whilst doing the former. That said, learning delivery deserves a separate section both for its significant market size and the significant investment L&D make in this space.

There is abundant literature dedicated to the design phase, including both spill-over from the design section and works specifically focused on making learning content accessible. In general terms, most works underscore five commonly recognised methods of learning delivery: face-to-face training, virtual classrooms, online learning, blended learning and mobile learning (Gautam, 2019).

During the pandemic and its immediate aftermath, most learning functions in organisations moved to virtual live and online asynchronous learning. As schools, universities and other educational institutes followed suit, Cisco Systems predicted three trillion minutes of video content would be streamed each month in 2021 for learning purposes, from virtual tutoring and videoconferencing to language apps (Singh, 2022).

In my view, the pandemic's impact on L&D sparked a change in the content delivery model from face-to-face to online; it did not prompt a re-evaluation in what or how people learn nor how they integrate learning with their experience to become better professionals. Arguably, it downplayed the importance of relationships and



contextual experience by driving more people into becoming isolated consumers of information.

In a study (Mikolajczyk, 2022) conducted during the pandemic on learning approaches in Polish firms, employees reported finding remote cooperation more fatiguing, stressful and onerous than in-person interactions. The study also pointed to decreased employee engagement and interest in training. (Mikolajczyk, 2022).

Depending on time and budget, the model of training delivery has varied. With advances in technology, e-learning now includes options such as virtual and augmented reality. Learning platforms have also become more sophisticated, moving from mere content hosting and tracking to learning experience platforms that connect to learning paths and AI algorithms to recommend learning artefacts depending on the learner's interests, role profile and development needs.

Excluding these new enhanced methods of delivery, nothing new has emerged in the literature that directly impacts the direction of my research.

#### *Technology-led instruction*

I briefly touch upon technology-led instruction to highlight the disconnect between where L&D invests – the left hemispheres – and what research has shown. In the global education space, Clark (1983: 445) is famous for his remark that 'media are mere vehicles that deliver instruction but do not influence student achievement any more



than the truck that delivers our groceries causes changes in our nutrition’.

In his literature review and related papers published in subsequent decades, he repeatedly points to empirical evidence to assert the limited impact of multimedia in influencing or motivating learning outcomes. He goes even further in his 1994 paper by suggesting multimedia learning might even *diminish* the learning impact, since he believes learners’ natural inclination is to choose the ‘path of least resistance’, leading to reduced engagement. For this reason, he says any gains are learner-specific based on their unique context, and urges educators to also consider the cost effectiveness of media in their decision making.

Unsurprisingly, his views have long sparked debate in the global learning community by calling into question the learning value and cost efficiency of the nearly \$12 billion invested yearly in the corporate L&D tech sector. According to the findings of repeated studies by Clark, these colossal investments have little connection to the research of adult learning, and by extension, to higher levels of knowledge absorption and people’s ability to address real-world organisational challenges. Media is simply a delivery mode with scarce influence on long-term learning impacts.

His conclusions stand in sharp contrast to the vast spectrum of offerings in corporate L&D sector, which range from AI-driven MOOCs and delivery modes like virtual reality, augmented reality and e-



learning to tech solutions to disseminate and track them. Although I understand his larger point, multimedia learning has improved by leaps and bounds since 1994, and, in some cases, surpasses in-person instruction. The larger issue is the allocation of L&D spend on online content, since it falls mainly in the left hemisphere of the graph.

### *Informal learning*

So far, I have addressed learning delivery in terms of how we provide and process content. There is the assumption that learning delivery is purely the conveyance and acquisition of content. Before further exploring organisational development, systems thinking and what it means to be human and learn, I would like to turn the focus on a theory that undeniably crosses over to corporate L&D and has validity for future organisations.

The roots of informal learning emerged from educational philosophers John Dewey, Kurt Lewin and Mary Parker Follett, as was later built upon by theorist Malcolm Knowles and other researchers (Conlon, 2004). Whilst there are several theoretical definitions of informal learning, I cite the one proffered by Dale and Bell (1999) as the most relevant to my context. As they state,

‘Learning which takes place in the work context, relates to an individual’s performance of their job and/or their employability, and which is not formally organized into a programme or curriculum by the employer. It may be recognized by the



different parties involved and may or may not be specifically encouraged' (Dale & Bell, 1999: i).

Meanwhile, Hager points out to nine differences between workplace learning and formal learning (Hager, 1998). Interestingly, he seems to refer to workplace learning as synonymous for informal learning, as I have represented in the following table:



No.	Formal/On-the-Job Learning	Workplace Learning
1	Teachers/trainers in control in both formal learning in education institutions and in on-the-job training – formal learning is intentional.	Learner is in control (if anyone is) in workplace learning which is often unintentional.
2	Learning in formal education and in on-the-job training is prescribed by formal curriculum, competency standards, learning outcomes, etc.	Workplace learning has no formal curriculum or prescribed outcomes.
3	In both educational institutions and on-the-job training, learning outcomes are largely predictable.	Workplace learning outcomes are much less predictable.
4	Learning is largely explicit (the learner is expected to be able to articulate what has been learnt, e.g., in a written examination or in answer to teacher questioning; trainees are required to perform appropriate activities as a result of their training).	Workplace learning is often implicit or tacit (learners are commonly unaware of the extent of their learning).
5	Emphasis on teaching/training and on the content and structure of what is taught/trained (largely as a consequence of 1-4).	Emphasis is on the experiences of the learner-as-worker, an important distinction in light of the power self-directed learning in employees' understanding of their role and life in the workplace.
6	Formal classroom learning and on-the-job training with an emphasis on individual learning.	Collaborative and/or collegial workplace learning as outlined in point 5, despite policy and rhetorical emphasis on self-direction and individual experience.
7	Learning in formal classrooms is uncontextualized, with an emphasis on general principles as opposed to their specific applications. On-the-job training is often somewhat contextualised, yet an emphasis on general principles still prevails, ex. training for general industry standards.	By nature, workplace learning is highly contextualised as noted in point 6, and should integrate emotive, cognitive and social dimensions of employees' experiences to advance their learning.
8	Learning in formal education and on-the-job training is typically viewed through the lens of theory (or knowledge) and practice.	Workplace learning is viewed as seamless know-how in the Aristotelian sense of 'phronesis' or practical wisdom.
9	In educational institutions and on-the-job training, acquiring knowledge is typically viewed as more difficult than learning skills. As a result, more teaching effort is usually dedicated to the former.	Workplace learning, defined as developing a competence or skill via a structured experience, does not make a distinction between knowledge and skills.

Figure 20 Formal Versus Workplace or Informal Learning, Hager.



Hager points to a social way of learning collectively and informally which is very characteristic of young and fast-growing organisations, wherein shared and site-specific experiences mean workers invest much of their personal identities in work, with learning and behaviour defined and re-defined by the local culture by 'the way we do things here'.

The very definition of learning varies by context, school of thought and theorist. In the *Encyclopaedia of Pedagogy and Informal Learning*, Smith says learning can be viewed as a product, memory or understanding, or as a process of form of thinking, stating that informal learning is often better described as self-education or self-directed learning (Smith: 1999, 2008). This is an important area to consider whilst examining how learning is facilitated and supported in accelerating organisations.

For his part, Conlon acknowledges that informal learning plays a considerable role in developing professional expertise in the workplace and private life, but believes that there is no current theoretical model to balance conflicts between the role of individual and organisational benefits in a global context (Conlon, 2004). Achieving this equilibrium would be central to the contributions of L&D in these organisations.

#### [On Learning Evaluation](#)

Evaluating the effectiveness of learning and proving its return on investment has long been a conundrum for L&D functions. How do you



justify spend on training? How do you measure its effectiveness? How do L&D professionals know if their solution has indeed sparked behavioural change and performance change? And within the organisation, does measuring all this really matter?

In 2021, I wrote a chapter entitled 'Learning Impact Through Data Analytics' in Brandon Carson's book, *L&D's Playbook for the Digital Age*, where I share my on-the-ground experience as a learning leader in an accelerating organisation and key considerations when formulating a practical learning analytics strategy. This subject is explored in greater depth in the 'Findings and Results' chapter, yet for now, I offer a broad overview of the evaluation landscape and the current theories and processes organisations use to evaluate learning, as well as some brief thoughts on its role in accelerating organisations.

One of the most prolific and widely used theories is by Kirkpatrick (1954), whose four levels of course evaluation outlined in his doctoral thesis remain the basis for assessing learning experiences. These four levels – reaction, learning, behaviour and results – have been adapted to various assessments and subject to several iterations, including the model by Phillips (1997), which added a fifth layer: return on investment (ROI).



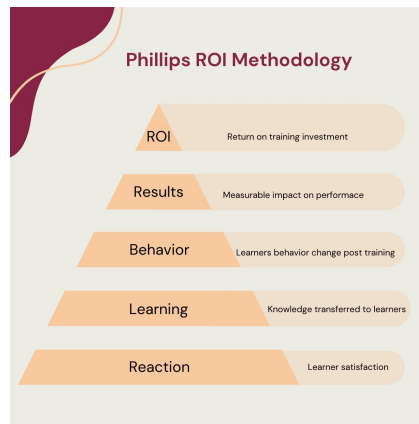


Figure 21 Phillips ROI Model

Another iteration is seen in the diagram created by Sutherland and Carmichael (2005) as part of their study on the value of an MBA:

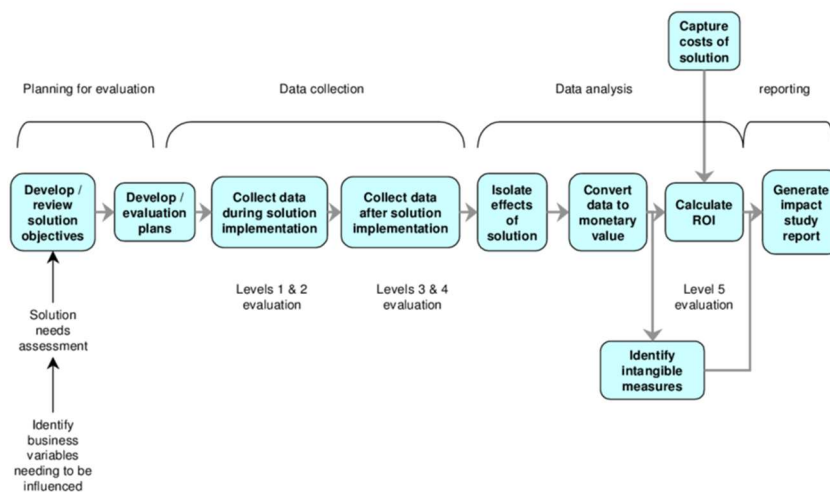


Figure 22 Demonstration of Phillips ROI Model

Phillips' model seeks to add a monetary benefit learning programmes or interventions. Whilst Kirkpatrick covers the non-monetary benefits of training, the ROI addition provides a solid cost-benefit analysis by interpreting the value of the training programme to tangible economic business benefits.



It is important to note that both Kirkpatrick and Philipp models have been the target of criticism, most notably, the impossibility of modifying or improving a learning solution since ROI is assessed after its delivery. Other L&D specialists question the linear approach of the model and implied causality or interrelation amongst levels (Reio et al., 2017).

As organisations increasingly have more and higher quality data, several evaluation theorists have provided alternatives to Kirkpatrick models, such as Anderson's (2007) model of choosing a blend of metrics based on the interplay between the learning function and business priorities; Thalheimer's (2018) LTEM, which starts from attendance at a learning intervention to measuring outcomes in terms of decision making, task competence and effects of transfer; Weinbauer-Heidl and Ibeschitz-Manderbach's (2018) 12 levers of learning transfer effectiveness; and Kaufmann's five levels of evaluation.

What differs in each model are their underlying assumptions and contexts of application. Often, a fundamental assumption made in the use and application of these models is that the effect of training can be isolated. That is, you can draw a black box around a training intervention and claim that any change in performance is causally attributable to the training intervention and not related to other concurrent dynamics in the working and commercial environment.

In my view, if L&D leaders aim to create an environment where people can take greater ownership of their learning needs, they need to move away



from the notion that they are evaluating a process or intervention, and think instead in terms of the broader impacts and dynamics at play. Consideration of impact needs much more systemic perspective and a very different approach.

Moving the conversation to a wider impact and context, Alkin (1969) says that evaluation must first consider and define the ultimate decision-making concerns to be served, select the appropriate information, collect and analyse it, and summarise useful to decision-makers when choosing among alternatives. Tracey (1968) outlines three main benefits of evaluation in determining:

1. Where the activity is at any given moment and providing a baseline for measuring progress.
2. The value of training and development program activities to the enterprise and of appraising the efficiency and effectiveness of the functions performance of the task set forth.
3. Whether the time, energy, and money expended in planning and operating programs of training and development are producing results sufficient to justify the investment (1968: 12-13).

Finally, Huber (2011) asserts that, if the crux of professional development is its real-life organisational impact, its associated metrics should consequently relate to professional effectiveness and competence, and expertise gained by reflected experiences and professionalism.



In this regard, he highlights two critical requirements to promoting learning in continuous professional development. First, he stresses the need to integrate diagnostic means as a starting point for training and development programmes. Whilst this point may be more relevant for simple systems, L&D functions should nonetheless begin by thoroughly understanding the learning requirements and defining measures of success in order to ensure the learning intervention supports overall organisational objectives. With this in place, the evaluation follows seamlessly from the intervention.

Second, Huber stresses sustainability as a focus of attention to ensure learners can effectively transform new knowledge into actionable insights. In emphasising the benefits of evaluation in sharpening learning design, he says learning should inspire learners to reflect on their unique competences and interests (reflection-oriented); activity-oriented to ensure their active engagement; and finally, performance- and feedback-oriented to promote ongoing improvement.

The method of loci (MOL) is another important and often overlooked consideration in organisations when evaluating learning effectiveness. The MOL is a mnemonic device that uses spatial relationships between 'loci' – for instance, sites on a familiar route or rooms in a familiar building – to organise and recall memorial content (Qureshi et al., 2014). In their 1975 study, Godden and Baddeley established the importance of context-specificity in the learning process. In their classic experiment, deep sea divers were found to have greater recall of memorised content in the context where they studied it: they better elicited content learnt underwater



when underwater, and content learnt on the ground when on the ground (Murre, 2021). Despite these findings, L&D professionals disregard the fact that gathering learners into classrooms renders innate spatial learning relatively defunct by taking them out of their typical context.

In my experience, companies operating at today's pace and scale rarely invest time in evaluating multiple levels of effectiveness of training programmes. In small, fast-moving organisations, the focus is on getting the design right and associating it to business outcomes so that ROI is self-evident after the programme.

Whilst I appreciate the latter models' emphasis on linking learning outcome success to business strategy, these often fail to call out specific business measures, show their linkage to the learning intervention, or consider relationships, systems and environment. I also believe that the more learning is divested to the learner in organisations, evaluation will come down to the individual experience and application – almost a trial-and-error in intervention and application. As mentioned before, in an environment where people manage their own learning needs, the emphasis moves away from evaluating a process and towards impact.

#### [Where L&D and OD Currently Overlap: Performance Consulting](#)

My research on fast-paced tech-driven organisations observes and recommends a less top-down control within the learning function. I believe learning in organisations will be managed through interactivity and



relationships connecting performance, talent, succession and business strategy.

For this, we need a balance between lesser but still present direct instruction, which shifts from the default option to a specialist tool leveraged only when determined as the optimal means to address a specific skill or knowledge deficiency, and backed by sound instructional design and predominantly learner-empowered experiential learning. Performance consulting and its continuing role in accelerating organisations can offer insight in this regard.

#### [Broader L&D: Performance Consulting](#)

The linking of performance – whether organisational or individual – to L&D is an important part of how learning should continue to exist in organisations in my opinion. Whilst aware of the linear causality approach of performance consulting, I have attempted to call out the prevailing models and underscore what can be leveraged from them even in the context of an accelerating environment.

- **Gilbert: pioneer in performance consulting**

The concept of performance consulting has recently gained traction in the L&D field, although it originally emerged in the late 1970s. It is defined as a systematic approach to improving human performance in organisations, or as Gilbert (1978:21) states, 'a science and technology of performance analysis, improvement, and control'.



Merging his knowledge of engineering, science, philosophy and technological improvement, he posited the 'behaviour engineering model' (BEM) to assess organisational performance gaps, analyse their underlying causes and detect possible solutions. The BEM identifies six categories that influence human performance:

- Data and information: This stage entails performance expectations, standards, desired outcomes, goals and objectives, which are clearly and consistently communicated to employees. Feedback is an important source of data and should be timely, specific and useful.
- Environmental supports and resources: These include time, tools, equipment, materials and financial resources.
- Consequences, incentives and rewards: Framed as either positive or negative, these must have meaning in order to elicit the desired change in such a way that people strive to attain positive consequence and in contract, aim to eschew negative ones.
- Knowledge and skills: Focused on performers, it aims to discern whether they have the necessary knowledge and skills – acquired through a diversity of sources – to perform optimally.
- A. Capacity: This pertains to a person's physical and mental talents and capabilities to perform.
- Motives: This realm refers to people's needs, desires, aspirations, fears, self-esteem, self-efficacy and other internal dimensions that drive their



actions and impact their performance. Effectively measuring human performance improvement has been a longstanding challenge given the numerous motives that lay outside the professional sphere.

This framework clearly falls in the left hemisphere of the Coomey-Stephenson model. One could argue that all the bullets listed could be viewed through the current lens of simple systems with direct linear causality, wherein performance consulting ignores complexity by assuming a 'single right answer'.

Despite its potential limitations, I believe it can help impact or influence performance at individual or organisational levels in L&D functions in accelerating organisations. Yes, it is difficult to determine if a change in performance was a direct consequence of a learning intervention. But the consideration of performance may help to anchor the L&D intervention by providing access to knowledge on the role being performed, which in turn impacts positively on performance.

During the course of my research, I have reviewed a number of models used to describe the performance consulting space. Whilst no means an exhaustive list, the ones highlighted in this study attempt to link the acquisition of knowledge through a learning intervention through either business or individual performance.

The learning consultancy ThinkingKap (2019) presents Gilbert's model as a 2x3 matrix to show how moving clockwise from data to capacity will pinpoint where to address knowledge gaps and subsequently, training needs.



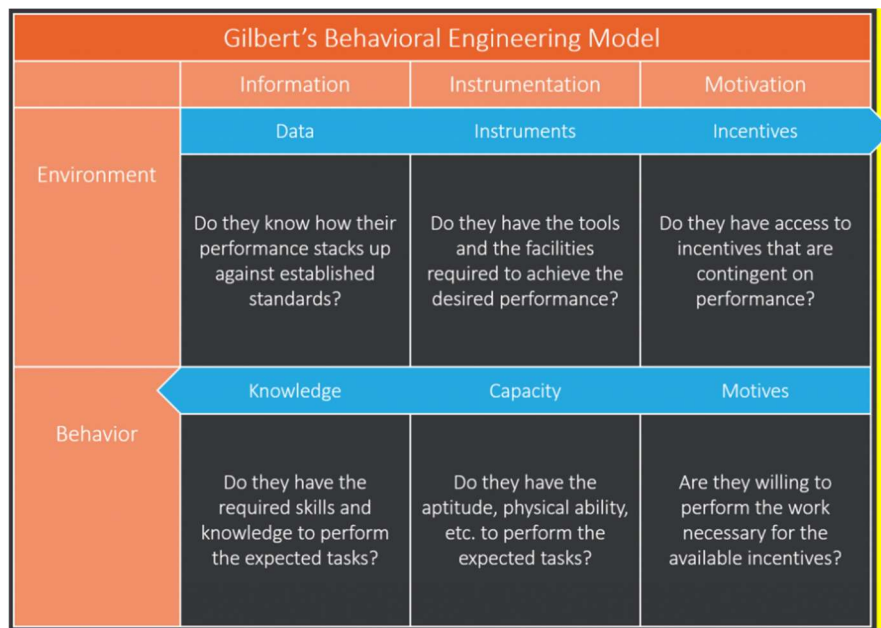


Figure 23 ThinkingKap, Gilbert's Behaviour Engineering Model

In this model, the 'Data' phase defines whether the employee knows how their performance compares against established standards and the organisation's expectations of them. Employees should have frequent and relevant feedback since it is too early to consider training if their performance is sub-standard. They move along the graph to 'Instruments', contending that:

"If employees do not have the right tools for the job, training will not fix that as also if proper incentives are not in place, new training will not make employees want to perform their jobs. As they move through – if employees are not properly motivated to do their job, training is not going to make them want to perform better. And finally, if employees literally don't have the capacity to perform a job, no amount of training is going to change that."



'Knowledge' is the box where the learning organisation would fit in, but the authors conclude that only 'if the other 5 boxes are in order, then you know you have a skills gap (training need). Other than certain extenuating circumstances, addressing knowledge without addressing prior stages will not be successful'. This thinking is still relevant in today's fluid, fast paced organisations despite being isolated to a single learning event or intervention.

Similarly, a much-quoted approach in L&D functions appears in the 1995 book by Robinson and Robinson. They define human performance as 'a process that benefits anyone who aspires to achieve organizational change, enhance human performance, and impact the business through influence'. In their updated version, they broaden this definition as 'a strategic process that produces business results by maximizing performance of people and organisations', introducing three concepts in the strategic process of performance consulting (Robinson, Robinson and Phillips, 2015):

1. The Performance Consulting process: nine critical steps, each requiring research and analysis on customer needs in order to be successful.



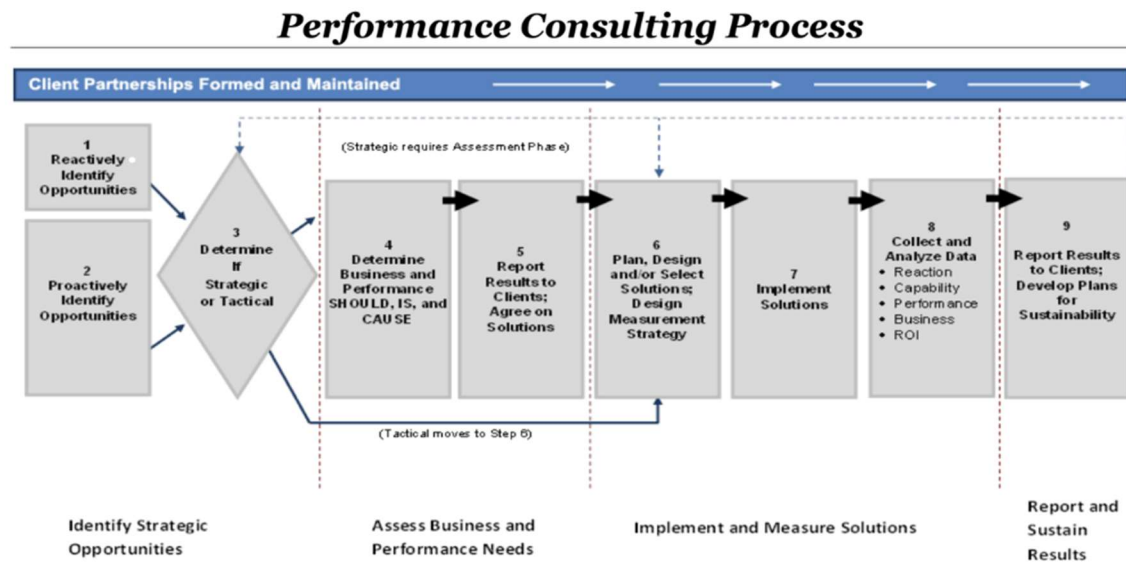


Figure 24 Robinson and Robinson Performance Consulting Process

I would assert, despite the model saying otherwise, that all steps, including 4 and 5, are needed whether the opportunity is strategic or tactical, otherwise, tactical responses may not be adequately address the need at hand.

2. The Performance Need Hierarchy: a review of the department's business needs, employee group and performance needs, organisational capability needs and individual capability needs.
3. A GAPS Map: steps to analyse organisational needs and gaps in employees' abilities and performance to achieve them.

In order for performance consulting to be successful, Robinson and Robinson underscore the importance of consultants' thoroughly understanding the business context in which it transpires, including deep knowledge of the organisation's strategy, goals, culture and challenges. No less important, they need to attain organisational buy-in from senior leaders, managers, key employees and other stakeholders.



A repeated issue with performance consulting is its disregard for the complexity and constantly emerging collaborative knowledge created within the context of an accelerating organisation. To be sure, this five-step framework translates into the field of L&D for the left quadrants of the Coomey and Stephenson model. For instance, the authors' emphasis on using data to inform decision-making throughout the performance consulting process can be extrapolated to the design, development and evaluation of learning artefacts, and goes back to the evidence informed design mentioned earlier in the chapter.

To assess interventions and ensure their efficacy, however, they underline the need for diverse data sources, i.e. performance metrics, employee feedback and observation of performance gaps, which highlights a fundamental flawed assumption in performance consulting: that learning is created to solve an organisation problem and addressed by training and skill development.

- **Wallace: performance consulting in instructional design**

Wallace (2011) examines this issue from an instructional design lens, urging companies to evolve from performance-based training organisations into performance consulting organisations.

Over the course of his decades-long career and several books, he created an enterprise process performance improvement (EPPI) model to help analyse and enhance organisational performance. Structured in five phases,



it stresses the need for a systematic approach to performance improvement grounded in data and analytics:

1. Define the corporate mission, objectives, KPIs and performance gaps.
2. Analyse current processes and detect areas for improvement by collecting data and examining the root causes of performance gaps.
3. Design solutions to address the identified gaps, including its scope, required resources and execution plan.
4. Develop and execute the plan, which may include training, new processes and the roll-out of new technological tools.
5. Implement a system to monitor the solution's effectiveness against the defined KPIs, recalibrate as needed and communicate results to stakeholders.

Wallace extrapolated this approach to learning design by generating several instructional system design (ISD) methods as a subset of his performance improvement methods. He also created PACT (Performance-based, Adaptive, Content, Training and Development framework), an instructional design methodology to help organisations better align their strategies and objectives to individual and team performance. Although similar to other instructional design methodologies, PACT stands out for its emphasis on aligning organisational goals and strategies with individual and team performance.

We are still in Coomey and Stephenson's left quadrants. And be it for accelerating or other organisations, I struggle to make the link that



definitively ties performance consulting and evaluation to a more fluid systems approach for organisational learning. I firmly believe that instructional design, when called upon in the left hemispheres, needs to be supported by business measures and justified by business outcomes. At the same time, I appreciate the positive impact of evidence-based instructional design on individual and team performance integrated in the aforementioned models.

#### [Positioning Performance Consulting in the Organisation Development Field](#)

Most references to performance consulting in L&D recognise the need of learning to impact individual and organisation performance yet still focus on the improvement of structured learning interventions to achieve corporate objectives.

In his article comparing performance consulting to organisation consulting, Rothwell (2015) defines performance consulting as a systematic approach to identify, solve and address performance problems with people in organisational settings, likening performance consultants to diagnosticians specialised in diagnosing problems with human productivity. He also believes, and I concur, that far too few managers are trained on understanding the root cause of human productivity issues effecting performance.

ASTD (now ATD, Association for Talent Development) worked with Rothwell to create the Human Performance Improvement Model for use in



organisational settings. Since L&D is seen as an intervention, it is named among the influencing factors in solution selection (Rothwell et al., 1996).

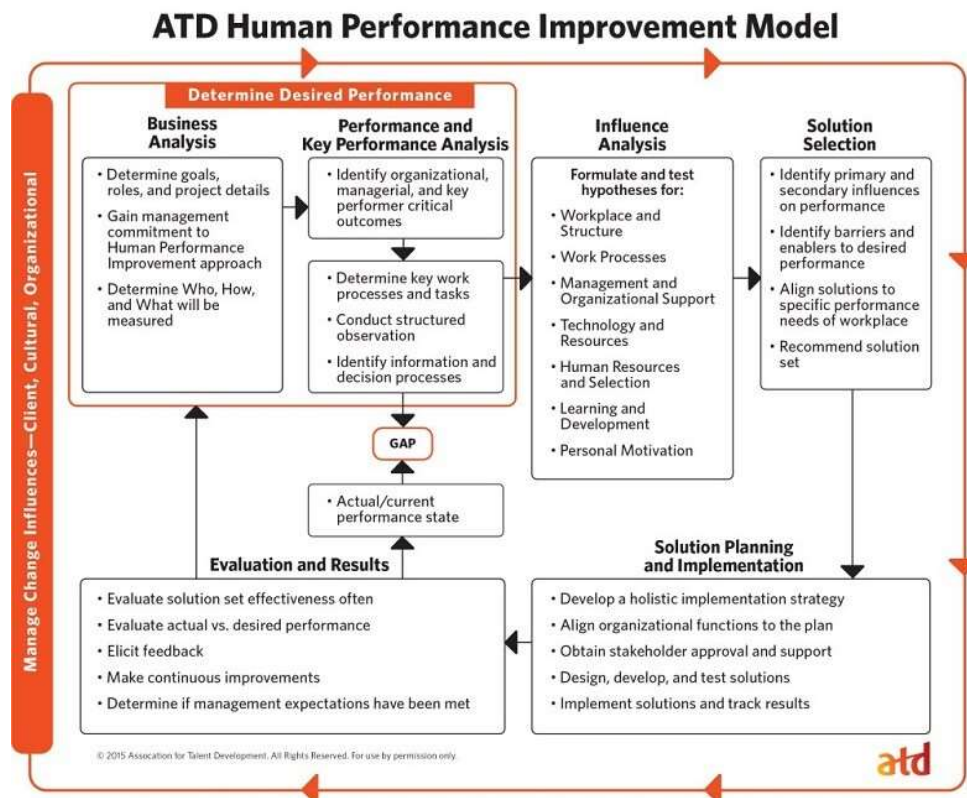


Figure 25 ASTD Model for Human Performance Improvement

Overall, Rothwell identifies three key components of human performance improvement – roles, competencies and outputs:

- **Roles:** the performance consultants, managers, trainers and other professionals who take part in human performance improvement.
- **Competencies:** the skills and knowledge needed to efficiently perform in these roles.
- **Outputs:** the results or products generated through human performance improvement efforts, including individual, team, organisational, process and societal performance.



For me, this diagram and explanation starts to close the loop between the principles of organization development, performance consulting and the role of L&D, but still in its traditional context.

According to Simmons, OD consultants aim 'to increase an organisation's capacity to initiate and manage change through an integrated approach to the company's social, economic, technical, and organisational systems, and to improve the performance and value of its human resources, using measurable criteria whenever possible' (Simmons, 1972: 53).

Meanwhile, Stolovitch and Keeps (2004) acknowledge that training alone is not enough to ensure improved job performance, pointing to numerous other factors that contribute to workplace performance such as the work climate, job design and management practices. Organisations should conduct an exhaustive analysis of workplace performance and realise strategic outlays to address concrete performance gaps rather than investing L&D spend on generic organisation-wide issues (Stolovitch and Keeps, 2004).

In their view, a learning leader needs to embrace the principles of performance consulting, organisation development and systems thinking, and look beyond specific interventions in order to be relevant to the future workforce.

Whilst the above acknowledges both hemispheres of the Coomey and Stephenson model, the transition and connections are less apparent. To me, it is trying to articulate the difference in symptoms versus systems thinking



(Douglas, 2018). The former looks at symptoms or concrete issues and assumes that a specific intervention or set of interventions – learning interventions in the case of L&D – can address these barriers to performance. Systems thinking, on the other hand, emphasises the exploration of the underlying and interconnected forces at work within the system that gave rise the performance issue.

Differentiating between the two is an important skill for L&D functions in accelerating organisations in my view.

#### [The Role of L&D in Firms of the Future: Systems Thinking and Organisational Learning](#)

Today and moving forward, L&D functions in accelerating organisations will need to continuously strike a balance between the left and right quadrants. In the context of hypergrowth tech-driven companies and the future workforce, I focus on the right quadrants, characterised by greater learner control. In this realm, the spotlight shifts from ‘teaching people skills’ towards embracing the principles of systems thinking and fostering frameworks that allow for self-learning, innovation, creativity and discovery.

In the case of L&D, operating in the left quadrants implies someone else invariably controls what you learn and is better poised to provide you with content. Given the speed and pace in accelerating organisations, tomorrow’s employees will likely prefer learning opportunities in the bottom right quadrant, with L&D playing a facilitating or guiding role. L&D’s role therefore is to link to the wider organisational context and ensure



development offerings respond to constantly evolving strategies and processes.

Van Vulpen (2019) defines organisational development as 'a critical and science-based process that helps organizations build their capacity to change and achieve greater effectiveness by developing, improving, and reinforcing strategies, structures, and processes'. Meanwhile, Arnold and Wade (2015) define systems thinking as the 'system of thinking about systems' – their elements, interconnectedness, complexities and goals. They cite systems thinking as an essential tool to address the increasing complexity of systems around us – social, political and even organisational – and the importance of understanding the deep roots of complex behaviours within them 'in order to better predict them and, ultimately, adjust their outcomes'.

Bridging both concepts, Westover (2020) says 'good organizational change and development requires a systems-thinking mindset and an interdisciplinary, holistic approach to tackling complex organizational challenges'. As he describes, today's organisations operate in ecosystems shaped by interconnectedness and constant feedback loops, and hence must be adept at addressing and fine-tuning their moving parts on a continual basis. Systems thinking offers clear benefits to organisations by helping them frame complex problems and avoiding common misdiagnoses when using linear thinking.



When applied to learning in organisations, I realised that relationships typically viewed as linear are actually deeply interconnected. As a function, L&D has conflated the delivery of content as the transmission of knowledge, related it to individual performance, and then assumed that connectedness to overall organisation performance.

As renowned systems thinker Ackoff (1989:10) observes, 'Knowledge cannot exist in a vacuum; it must be anchored in an understanding of the relevant context. And context must be tailored to the specific needs of an individual or organisation'. His pyramid DIKW model illustrates the relationships between different levels of information processing:



*Figure 26 Williams' Version of Ackoff's DIKW Pyramid*

Whilst originally presented as a pyramid, Williams' model (2014) perhaps better describes the hierarchy between levels:



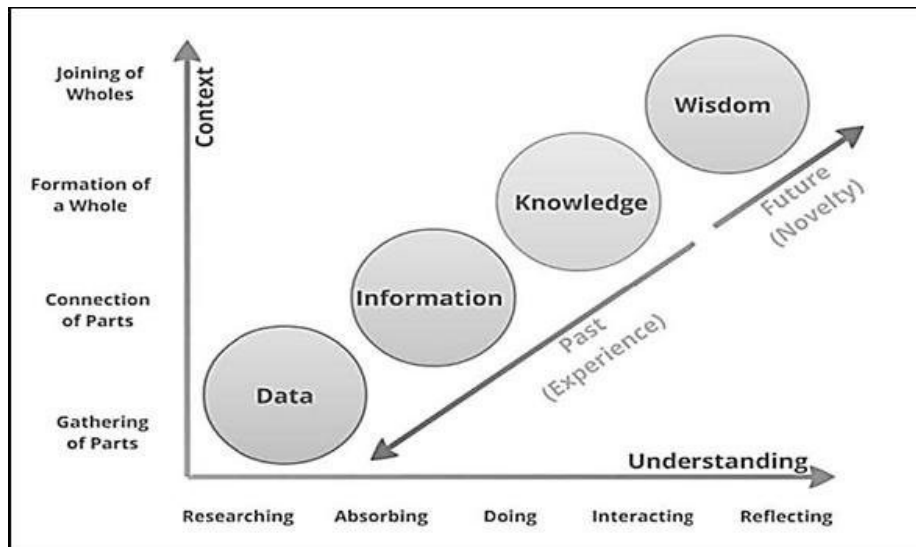


Figure 27 Williams (2014) Version of the Ackoff DIKW Model

In my view, Williams' model brings together the concepts of data, information and knowledge within the context and the understanding of an organisational system. I see the role of organisational development in learning as a systematic way of promoting change to spur growth but with a long-term approach, and systems thinking as a tool in this process.

For his part, Allen (2023) offers this view of systems thinking and its emphasis on diverse perspectives:

It encourages us to explore inter-relationships (context and connections), perspectives (each actor has their own unique perception of the situation) and boundaries (agreeing on scope, scale and what might constitute an improvement) between the elements that comprise the whole of the system. It is therefore particularly useful in addressing complex or wicked problem situations [...] which cannot be solved by any one actor, any more



than a complex system can be fully understood from only one perspective.

When you apply these concepts to humans learning in organisations, it reinforces the social and interconnected nature of learning to organisation development to systems thinking. Humans in organisations learn within the context of their operations, but also from each other within the same context. These dimensions are underlined in work by Bandura (1969), whose social learning theory defines the learning process as a five-step process entailing observation, attention, retention, reproduction, and motivation. The 70:20:10 model by McCall et al. (1996) also highlights the social nature of learning, positing that 70 percent of learning comes from experience, experiment and reflection, 20 percent from working with others and only 10 percent comes from formal interventions and planned learning solutions.

We establish that organisations are a complex web of systems, with ever-evolving needs of development and connectivity in which humans need to agilely learn and perform to cope with a business landscape in constant flux and within the context of business strategy. The connectivity to the systems, context, business and each other enables learning, and conversely, the connection of learning back into the business. It is important therefore to explore what the role of an L&D function would be in facilitating the framework.



In this literature review, I chose to explore the notion of a 'learning organisation' since it arose repeatedly in both my conversations with interviewees and in my findings. Amongst most of my research participants, this concept often emerged as integral to making learning 'stick' in an organisation, with the success of organisational learning often described in terms of its mindset for learning and growth.

The starting point of any discussion on organisational learning is Chris Argyris, a leading organisational trainer who pioneered the concept in the 1980s. Working in collaboration with Donald Schon, he put forth the concept of single- and double-loop learning (1978), emphasising the need for norms, strategies and processes in organisations in order to unite employees around a common objective.

That said, they stressed that these frameworks should not be set in stone but rather continually tested and challenged as people learn from each other and new ideas emerge. Organisational learning could thus be described by this fertile, ongoing exchange of inter-relational learning as the organisation evolves over time.

Originally printed in the *Harvard Business Review* in 1977 and reprinted in 2009, Argyris described his context of single- and double-loop learning in organisations (Argyris, 1977), defining organisational learning as a process of detecting and correcting error, defined as any feature of knowledge or knowing that inhibits learning. Thus, single-loop learning allows



organisations to detect and correct errors whilst promoting their present policies and objectives, whereas double-loop learning entails detecting an error that impels the organisation to change its policies or processes.

In his research, Cartwright (2022) also highlights the importance of the latter for educating managers and organisational leaders, stating that both double-loop learning and leadership is about transformation. He describes double-loop learning as a process that allows people to acquire and assimilate new information and develop new skills, as well as challenge and potentially discard familiar and dysfunctional ways of thinking, feeling and acting.

As he states, 'Drilling down into the subject of leaders and leadership will take learners past the obvious to some of the non-obvious notions we all have held that no longer function well in our evolving world of work' (2002: 69). To me, this is another case for empowerment to facilitate learning in organisations.

Senge further built on the idea of a learning organisation as those 'where people continually expand their capacity to create the results, they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole together' (Senge: 1990:3). He rightly observes that, in situations of rapid change, only those organisations that are flexible, adaptive and productive will excel. To ensure their long-term survival, organisations need to 'discover how to tap people's commitment and



capacity to learn at all levels' (Senge, 1990:4), and inspire 'generative learning' learning to bolster people's capacity to create (Senge 1990). Of the five elements he cites as the cornerstones of learning organisations – systems thinking, personal mastery, mental models, building shared vision and team learning – he places the highest emphasis on systems thinking. More recently, Hess (2014) expanded on the work of Argyris, Schon and Senge in the specific context of today's rapidly changing business environment, arguing that organisations that fail to learn and adapt quickly are doomed to fail. As he notes, learning occurs through a combination of formal training and education together with experiences, interactions and feedback, underlining emotional engagement as a linchpin for individuals' learning and retaining. He outlines the following elements of successful learning organisations:

- **A culture of curiosity:** employees can ask questions and look for new information and ideas.
- **Experimentation:** employees are safe to experiment and learn from failure.
- **Growth mindset:** the belief that abilities and intelligence can be developed over time through persistence in the face of obstacles.
- **Collaboration:** emphasis on teamwork and knowledge sharing.
- **Continuous improvement:** a commitment to continuously improving processes, products, and services.
- **Encourages reflection:** employees are able to reflect on their experiences and learn from one another.



Hess's emphasis on a culture of curiosity and experimentation echoes the concept of Schon's (1983) 'reflective practitioner', who 'can surface and criticize the tacit understandings that have grown up around the repetitive experiences of a specialized practice and can make new sense of the situations of uncertainty or uniqueness which he may allow himself to practice' (Schon, 1983:61).

Kolb similarly expands on the notion of the reflective practitioner to create his reflective experiential-learning cycle. Following an experience, its take-aways are reviewed, analysed and evaluated systematically in three stages, and once the cycle is completed, new experiences will form the starting point for another cycle (Kolb, 1984).

In his doctoral thesis, Paine (2021) further refines the definition of learning cultures as those that not only cultivate individual learning but also promote the quality and frequency of connections between individuals. In organisations with learning cultures, he observes:

Learning is viewed as a strategic asset that contributes to the organization's success and competitiveness, and the learning and development function is seen as a critical partner in achieving business goals. [...] employees are supported and encouraged to develop their skills and knowledge in order to meet the changing demands of their job and the organization, and to achieve their full potential as professionals (Paine, 2021: 83-84).



According to Bersin (2022), the steps to building a learning culture have broader implications beyond the human resources function. Rather than an L&D or HR problem, learning cultures are the result of a management philosophy and employee-focused practices such as 'rewarding people for taking risks, taking time to reflect and discuss mistakes, giving employees autonomy to learn from their errors, and pushing people to take stretch assignments with the support to succeed' (Bersin, 2022: 151).

Drawing upon their previous work, Marsick and Watkins (2003) developed the Dimension of the Learning Organisation Questionnaire (DLOQ) to measure the most salient shifts in an organisation's climate, culture, systems and structures that might impact how individuals learn. Through their findings, they hoped to enlighten corporate leaders that 'it is not enough to hold individuals accountable for learning continuously without also building the organisation's capacity to support, encourage, and make use of that learning' (2003: 132-151).

They also hoped that organisations would see that 'it is good business to invest in and reward learning – and that they will not realize these benefits if they do not also attend to the elements of the culture that now squelch learning' (2003: 132-151).

Administered to over 200 organisations, the DLOQ measures seven aspects of learning culture, as depicted in the following figure:



Dimension	Definition
Create continuous learning opportunities	Learning is designed into work so that people can learn on the job; opportunities are provided for ongoing education and growth.
Promote inquiry and dialogue	People gain productive reasoning skills to express their views and the capacity to listen and inquire into the views of others; the culture is changed to support questioning, feedback, and experimentation.
Encourage collaboration and team learning	Work is designed to use groups to access different modes of thinking; groups are expected to learn together and work together; collaboration is valued by the culture and rewarded.
Create systems to capture and share learning	Both high- and low-technology systems to share learning are created and integrated with work; access is provided; systems are maintained.
Empower people toward a collective vision	People are involved in setting, owning, and implementing a joint vision; responsibility is distributed close to decision making so that people are motivated to learn toward what they are held accountable to do.
Connect the organization to its environment	People are helped to see the effect of their work on the entire enterprise; people scan the environment and use information to adjust work practices; the organization is linked to its communities.
Provide strategic leadership for learning	Leaders model, champion, and support learning; leadership uses learning strategically for business results.
Key results	
Financial performance	State of financial health and resources available for growth
Knowledge performance	Enhancement of products and services because of learning and knowledge capacity (lead indicators of intellectual capital)

*Figure 28 Definitions of Constructs for the Dimensions of the Learning Organisation*

Following this study, they concluded that an organisation's systematic efforts to capture and share knowledge were the sole predictors of its knowledge performance, adding that HR specialists could advance their aim by using the language of business and learning when communicating with company leaders.

These findings directly map to the Coomey and Stephenson model with L&D's role firmly planted in the facilitator and coach quadrants by providing the conditions to collaboratively create and share knowledge to support organisation and personal growth.

[A deeper dive into learning culture](#)



Based on my experience, learning culture for fast-paced hyper-growth organisations comprises two parts:

1. Fostering an environment where learning is relevant, accessible, experiential and applicable.
2. Providing a safe space to allow employees to fail and learn as they attempt again.

According to Prof. Ben Laker of the University of Reading, continuous improvement depends on an organisation's capacity to create work environments where employees feel safe to make mistakes and learn from them. As he observes, failures are not overlooked, but rather addressed constructively addressed by:

1. Reframing incidents as opportunities.
2. Rewarding people for sharing knowledge.
3. Reviewing what went wrong to move forward.

In the view of Edmonson (2018), these types of work contexts cultivate psychological safety, in which people operate in an optimum team environment for interpersonal risk-taking and feel free to express their ideas, questions, concerns or mistakes without fear of humiliation, punishment or other negative consequences.







the issue and their specific context, and question possible underlying beliefs or assumptions before contemplating potential solutions.

Design thinking as defined by the d. school includes five stages, which overlap and feed into each other:

1. **Empathise:** gain deep insights into the needs of end users
2. **Define:** state their needs and problems
3. **Ideate:** challenge assumptions and create ideas
4. **Prototype:** start to create solutions
5. **Test:** try your solutions out

In stages 4 and 5, teams create mock-ups of the proposed solution grounded on the data and conclusions from the previous stages, and test it with users to validate whether it is desirable, feasible and viable. If not, the team may repeat iterations in the prototype stage until the solution meets users' needs, or loop back to previous stages, which is why design thinking is non-sequential. In this regard, a 'fail fast' objective is embedded in the design thinking process, with the aim of discovering shortcomings early in the process so organisations can cut their losses and pivot to a better solution.

As mentioned earlier, my literature review includes works from peer-reviewed researchers and industry thought leaders whose insights relate to my organisations of focus, with the exception of studies sponsored by technology vendors or training providers. The authors reviewed explore the design, measurement and elements of learning, yet very little on the L&D



industry, how it is failing or succeeding, or the mechanics of a successful corporate learning function.

What I have set out here is a complex adaptive systems view of world which I appreciate is a world away from the performance consulting models that are locked into a machine metaphor of simple or complicated systems that submit to knowable linear causality. I am aware that the two views are not compatible. Performance consulting might work in a production environment, it does not work in the same way in a complex adaptive social environment that pervades in rapid growth organisations. For me, multi-angled, non-linear frameworks (systems thinking, design thinking) is far more suited for accelerating firms given the complexity of their businesses and fast pace of operations. These models also adapt to the social way in which people learn – bringing in different perspectives and learning from each other. But I recognise the role that performance consulting continues to play, and demonstrate this in my model in the Findings chapter.

In terms of the second aim of my research – defining the capabilities of learning leaders in accelerating tech-driven environments – I perceive a gap in the academic literature. In these works, scholars focus predominantly on how humans functionally learn and L&D strategies to improve the learner experience, yet overlook the practical implications of running a learning function in constantly evolving organisations. In this realm, the expert voices are those of learning leaders who speak from experience – with or without the research to back their insights.



### Bridging the hemispheres of the Coomey and Stephenson model

Peter Senge regarded organisational interactions as key to the development of 'learning organisations', a term he popularized in *The Fifth Discipline* (1990) also mentioned in the Context chapter. Although he agreed on the importance of individual learning and personal mastery, as a systems thinker, Senge emphasised the need to understand how everything interrelates and fits together as a whole, culminating in a shared vision of how to get things done. Learning organisations do not happen by chance. Moving from learning individuals to a learning organisation requires a shared vision and alignment between what individuals want to learn, what the organisation aspires to become and the capabilities needed to reach its overriding objectives. As Káganer and Samila (2023) note, this common direction is set from the top.

Crossan et al. (1999) concur with this blend of learner-centred individual learning within the wider framework of overall organisational objectives. In their paper, 'An organizational learning framework: From intuition to institution', the authors view organisational learning as a multi-level process, that starting with 'intuiting' and 'interpreting' at the individual level, and 'integrating' and 'institutionalizing' at the group and organisational level. Overall, the aim is to show how organisations remain competitive over a long period of time when these four processes work very well.

The process of institutionalising is especially important by distinguishing organisational learning from individual or ad hoc group learning. As the



authors observe, it is more than the aggregate of individual learning experiences, but rather the learning that remains embedded in the organisation's routines, practices, systems and norms despite changes in the employee pool.

In young organisations, individual and group learning may predominate given their smaller size, shared interest and open lines of communication. As the organisation grows, formalised systems will be needed in order to capture its accumulated knowledge and patterns of communication.

For me, these studies highlight a dual interpretation of the relationships between the hemispheres of the Coomey and Stephenson model:

- The Balance – for L&D to understand what would continue to be directive, regulated and delivered in a more instructive way in organisations, and what would benefit from a more systems thinking, creativity and knowledge creation framework.
- The Journey – for L&D to manage the transitions from the top left quadrant to the bottom right to the top right, and finally to the bottom right, and to understand the role they play in each stage of the process.

Another argument for viewing the role of L&D in a systems paradigm is the human tendency to engage in 'monocausality', that is, to view and address the problem rather than go back to the precipitating factors that might have had a hand in its cause (Hulme and Finch, 2015). Though the authors refer to systems thinking in a sports medicine context, the analogy can be



extrapolated to the arguments in this paper. They recommend an 'upstream' view that encompasses geographical, social and historical factors, as opposed to viewing exposure-disease relationships as self-contained, homogenous and universal phenomena.

According to systems thinking, systems are made up of sub-systems that contain interconnected components, which are all subject to continuous adaptation and flux. For this reason, understanding the framework in which a firm operates and the interconnectedness of its systems can help L&D better understand the goals, outcomes and performance of learning journeys within a broader, more strategic organisational context.

#### [Research conducted on the L&D landscape](#)

Of the large number of studies conducted yearly on L&D in the workplace, many focus on ideas to expand and enhance L&D's situatedness in organisations. Analytical (i.e., survey) research on the L&D and HR community assumes an L&D function will always exist, and posit strategies to preserve and improve it. The angle of these studies and their undergirding assumptions are important to flag since they often serve as learning leaders' only source of insight on changing industry dynamics or emerging trends.

#### [Analytic research on the L&D and HR community](#)

Industry research is the focus of this section: institutes, vendors and consortiums that conduct field research by interviewing and surveying learning, HR and business leaders. Their reports reflect the mood, understanding and concerns of people managers in the current landscape.



Some are published by institutes whose industry research is part of their raison d'être, among them, the Emerald Group (formerly Towards Maturity), the Learning and Performance Institute (LPI), the World Economic Forum (WEF), the Chartered Institute for Personnel and Development (CIPD), the Fosway Group, and the Association of Training and Development (ATD). Other reports are authored by think tanks of advisory firms such as Deloitte University Press or McKinsey Global Institute.

I refer to additional studies in my review, which outlines the key themes and similarities to emerge from all sources reviewed.

**Key Observation 1: The assumption that a managed learning function will always exist although possibly in a different form**

As I review the landscape of information, I am conscious of an overlap in several 'knowledge cultures' (Brown, 2015). My individual experience and research observations indicate a disconnect between what future organisations need and what we in L&D currently provide, leading me to further investigate this gap.

My community of practice and the research papers and thought leadership they publish acknowledge the need for L&D to evolve in order to remain relevant. Nonetheless, all stop short of speaking of the extinction of a managed learning function in the future, and indeed, eliminating a formal L&D function isn't an option in highly regulated industries.

It would be fair to mention that several L&D thought leaders have authored books and lead consultancy firms that advise businesses on their employee agenda. In my review, I was aware that some of these studies might start



from a set viewpoint and potentially seek confirmatory evidence and address an audience like me and my colleagues – other heads of HR and L&D – who would also make up their primary market for services. Therefore, even those that speak of evolving organisations into better learning cultures assume the L&D function will serve as the core driver of this change.

As an example, the 2018 *Towards Maturity Learning Benchmark Report* takes Peter Senge's model of the learning organisation (Senge, 1993) a step further by positing the six characteristics of the 'new learning organisation'.



Figure 30 Six Characteristics of the New Learning Organisation

In its formulation, it highlights four stages of learning maturity that L&D would lead – optimising training, taking control, letting go and sharing responsibility – with an emphasis on the use of analytics to create a holistic user experience and shared focus on outcomes (Towards Maturity CIC, 2018). I considered this a comprehensive view of the industry, since it



incorporates the opinions of 5,600 senior learning leaders and 40,000 employees from over 55 countries, many of whom have participated in the independent Towards Maturity Benchmark Study since 2003. Its results and resulting theory seek to provide learning leaders with tangible models to create learning cultures and foster a greater knowledge-sharing environment in their organisations. The survey also highlights what the top 10% of surveyed firms are doing differently.

Another leading study is LinkedIn Learning's Workplace Learning Report 2018 (Lefkowitz et al., 2018). In a survey of over 4,000 talent leaders, executives, managers and employees, the study acknowledges the changing role of the learning professional as a 'relationship builder' with 'a critical role in shaping future workforce strategy, while delivering hyper-relevant content to support employee needs of today and catering these vast efforts to a multi-generational workforce with varied learning preferences'. It identifies the six top workplace learning trends and once again, sees the talent/learning professional and function as the key to addressing these. From reducing the impact of automation to navigating the skill demands and gaps, from managing the effects of digital transformation to implementing learning platforms for users and cultivating relationships with the business, the L&D professional is seen as having a vital role in cultivating the growth mindset.

In 2012, the Centre for Performance-Led Human Resources (CPHR) commissioned a white paper entitled 'Learning & Development: Seeking a Renewed Focus?' (Hird and Sparrow, 2012), which offered three possible



future scenarios for L&D as listed by the Institute of Employment Studies. In the first scenario, 'L&D is queen, where the learning impact is clear. Organisations value learning and employee well-being, and use segmentation tools to define individual development needs, while learners are also more highly skilled in technology and community resources. In the second, L&D is an 'organisational necessity'. In this context, learning is deemed a cost to contain, with a sole focus on direct relevance to the job. Firms rely on low-cost stop-gap programmes to address knowledge gaps and have no strategic vision of L&D (2012). L&D makes employees responsible for their own learning and tracks employee investments. Lastly, the scenario of 'national learning', in which organisations depend on outside contractors and temporary associations to find talent with the skillsets that reflect their brand. Contract-based learning populations are managed by employment brokers and occupational guilds under this scenario (2012). These and other studies, in addition to assuming the corporate L&D function will continue to exist, do not tend to distinguish between industry and organisation type, nor do they venture to recommend an ideal structure for the function.

**Key theme 2: Technology-based organisation change is constant but increasingly accelerating**

Today's business environment has been shaped by rapid technological advancement and digitisation of the workforce. Often referred to as digital disruption, Gartner describes it as 'an effect that changes the fundamental expectations and behaviours in a culture, market, industry or process that



is caused by, or expressed through, digital capabilities, channels or assets' (Gartner, 2018a). Organisations and industries both have been disrupted by tremendous advancements in technology, the emergence of new technology-driven organisations, and associated changes in human interactions and organisation structure. Gartner lists the following top technology driven organisational changes for 2018:



Figure 15: Gartner Special Report 'Top Strategic Technology Trends for 2018'

Likewise, World Economic Forum Founder and Chairman, Klaus Schwab, refers to the 'fourth industrial revolution', characterised by 'a fusion of technologies that is blurring the lines between the physical, digital, and biological spheres'. He believes humanity stands on 'the brink of a technological revolution that will fundamentally alter the way we live, work, and relate to one another. In its scale, scope, and complexity, the transformation will be unlike anything we have experienced before' (Schwab, 2016).



As these and other experts agree, technology will continue to disrupt current ways of working, and organisations that fail to adapt and change quickly are in danger of irrelevancy or even worse, extinction (Meister, 2017).

Artificial intelligence is perhaps the most recent example of a significant digital disruptor to workplace dynamics. According to McKinsey Global Institute (2017) research, by 2030 up to one-third of work activities could be displaced by automation including AI applications. For its part, a PwC report (2017) states roughly 38% of U.S. jobs are at risk of being affected by automation by the early 2030s, with other countries closely behind: Germany at 35%, the UK at 30%, and Japan at 21% (Prentoulis et al., 2016). All of this underscores two major themes: constant change and the need for organisational and workforce agility to address and adapt to it.

What are the practical implications for organisations and the people who work for them? McNamara describes the 'new nature' of organisations as those with greater employee involvement, fewer rules and regulations, unclear boundaries at times, and always-changing forms. He describes flatter and decentralised structures with more collaborations, networks, alliances and other means to exploit economies of scale (McNamara, 2006). In the 2017 Global Human Capital Trends study, Bersin et al. add that, in an age of digital transformation, the successful organisations of tomorrow will likely be those that can move faster, adapt more quickly, learn more rapidly and embrace dynamic career demands (Deloitte University Press, 2017).



The concept of an organisation evolving, transforming and adapting through continuous learning in its workforce is not new, but awareness on the use of technology as a driving force in future organisations' success has grown (Tapscott, 1993). Vaill also extensively discussed continual learning in a world of constant change, coining the phrase 'permanent white water' (Vaill, 1996).

In my opinion, these principles also needed to be examined in relation to fundamental structures, roles and operating models in corporate education, which in turn require additional analyses to ascertain if they adequately address the pace of change in rapid technology-driven organisations.

#### [Post-pandemic changes 2020-2022](#)

The years of corporate disruption triggered by COVID-19 prompted shifts in both L&D research and responses from learning, people and organisational leaders. Studies reflected different areas of focus and themes changed. In terms of those relevant to my research, I would highlight two: technologies to deliver learning content and courses, and the upsurge in hybrid working.

- Technology to deliver learning content and courses:

Literally overnight, the pandemic and resulting lockdowns led to cancellations of in-person training and its shift to online formats. The difference in 2020 was stark, as depicted by the chart below from ATD's 2021 *State of the Industry* report.



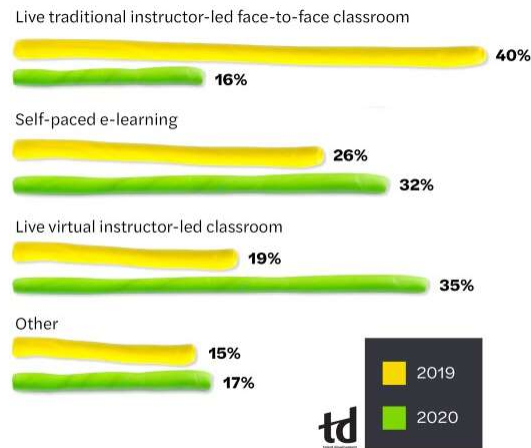


Figure 31 Learning Hours Use by Delivery Method

Numerous outlets echoed this trend. In a 2021 CIPD-Accenture study of 1,200 British firms, 70% of businesses cited an upturn in their use of digital or online programmes in the preceding year, and 36% had increased their investments in learning technologies and platforms.

In Europe, the May 2020 survey by the Fosway Group showed similar pandemic-related impacts on corporate L&D, with 82% of L&D professionals reporting increased demand for online learning amongst senior stakeholders and 71%, amongst digital learners. During this time, video content was deemed the most successful in supporting learning, followed by curated content, mobile learning and microlearning.

Results from a 2020 *People Management* survey conducted during the pandemic were also telling. Gathering the views of 210 respondents, the survey found 75% had altered their training delivery systems, with half moving their training offerings online. This indicates a rapid shift as before the pandemic, only 15% reported offering training courses online (2021).



How do these findings impact global firms, especially the tech-driven accelerating organisations targeted in this research? First, it has triggered higher spending in learning technology and digital content, and a sharper awareness of the importance of diverse online technology methods to ensure the workforce is able to continuously upskill (or at least, consume content) under very disruptive circumstances.

These shifts also sit in the left hemisphere of the Coomey and Stephenson model, reinforcing once again where L&D channelled its learning investments during the pandemic: in content and methods to deliver it.

- Hybrid working

One of the biggest changes in the aftermath of COVID-19 was the prolongation of hybrid working. Introduced as remote working during the pandemic, companies found their employees preferred it since it offered a better work-life balance. According to a 2022 study by the British government, roughly 12% of the population worked remotely at least one day a week in 2021, and 5% worked exclusively from their home office.

Whilst the rate of remote work has progressively dropped with the lifting of mobility restrictions, it remains above pre-pandemic levels. In September 2022, around 22% of British employees had worked at least one day from home in the previous week and 13% worked exclusively from home.

Following this shift, organisations recognised an upside: they had less need for real estate, which is a key cost consideration for start-ups. Based on an



August 2020 McKinsey survey of 278 executives, companies on average planned to reduce office space by 30%.

Whilst this does not change the premise, direction or outcomes of my research, the pandemic undoubtedly changed the extent of face-to-face organisational interaction amongst employees, as well as between organisations and their customers. It is still early to establish the real impact of this change on business operations and by extension, on individual performance and learning, yet is nonetheless important to highlight at this stage.

#### [The Futurist View: Society and Organisations](#)

This section explores the work of general futurists, who offer a broader social view of future changes prompted by rapid automation and machine intelligence, and the role of humans in this new landscape. As an offshoot, I also examine authors who in past decades spoke of innovation, changes in learning and organisations, and paradigm shifts therein, and the impact of their theories in the current context.

Like these thought leaders and futurists, I also find fascinating the analysis of what the workforce needs to stay relevant and employed in a technology driven world. Several propose 'humanist' skills and career paths for the workforce of the future, which is interesting to view against the skills L&D functions are providing the workforce of today.

According to the McKinsey Global Institute, the initial and immediate consequences will primarily lead to lower demand for physical, manual and



basic cognitive skills, such as those required for data input and processing. As Bughin et al. (2018) note, these areas have already recorded 15% and 14% declines, respectively. That said, this effect will quickly extend to other professions, dramatically changing expectations of the necessary human skillsets and the tasks to be performed.



Figure 32 McKinsey's Skill Shift Automation and the Future of the Workforce

Susskind and Susskind (2017) expand this thinking to medicine, education, legal, tax advisory and other specialist professions, which they claim are antiquated and unaffordable. In their view, technology will make expertise much more accessible to consumers, reducing the need for human intervention and displacing much of the current professional workforce. They envision roles where humans serve as specialist 'empathisers'. This view supports the writings of other futurists, who underscore empathy as an essential skill for the future workplace.



A recent Accenture study on the future of work highlights a shift toward roles performed by both humans and machines – augmentable activities improved by the collaboration between human and machine. At present, L&D does not adequately address the two most significant areas defined in their article: empathy and support, and management and leadership.

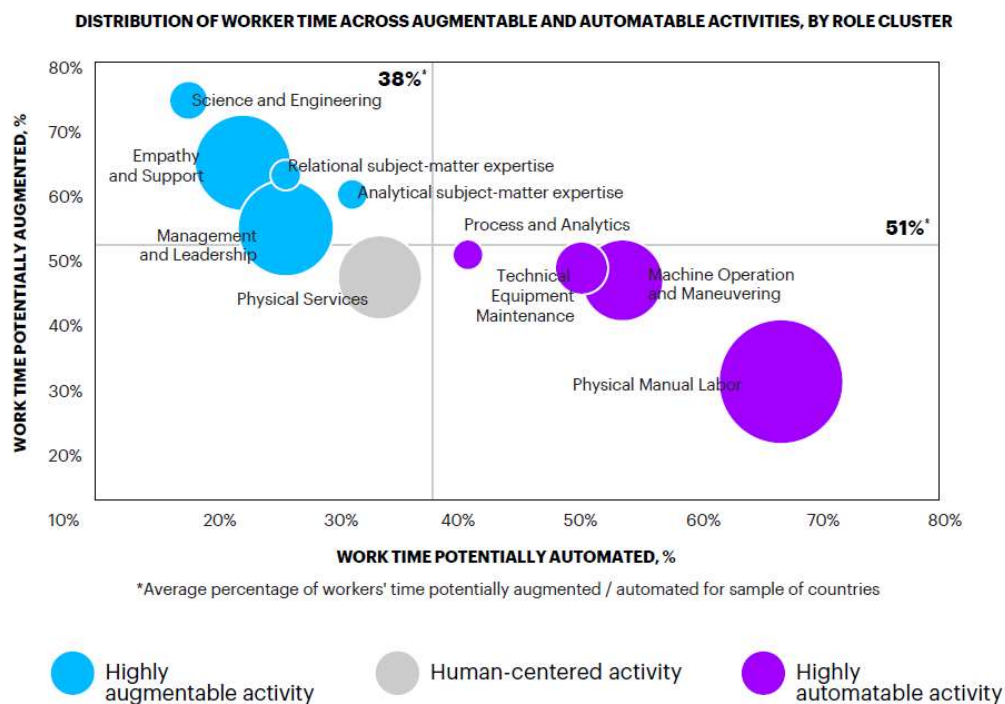


Figure 33 Accenture's 2018 Inclusive Future of Work Report

The study primarily directs its focus on inclusivity vis-à-vis the labour force in Brazil, France, Germany, Japan, South Africa, the United Kingdom and the United States: as automation proliferates, preparing workers in routine jobs with mostly primary and secondary educations for the downward shift in demand for their skills. What stands out is its acknowledgement that the skilling ecosystem – consisting of learning and training programmes from workforce development organisations, employers, educators and



government – does not currently support workers at the speed and scale needed to help them transition to tomorrow’s career pathways (2018).

The study suggests six critical skill groups of the digital, technical and unique human competencies workers will require in order to thrive in the digital economy, and recommends employers, educators and governments adapt their training initiatives to this new landscape. Might this be a model that L&D functions could adopt and scale to promote a very different view of what ‘skilled’ means in a new global workforce in rapidly accelerating organisations?

**Box 1:** New Skills Now Taxonomy: Skills Families Critical to Thrive in the Digital Economy

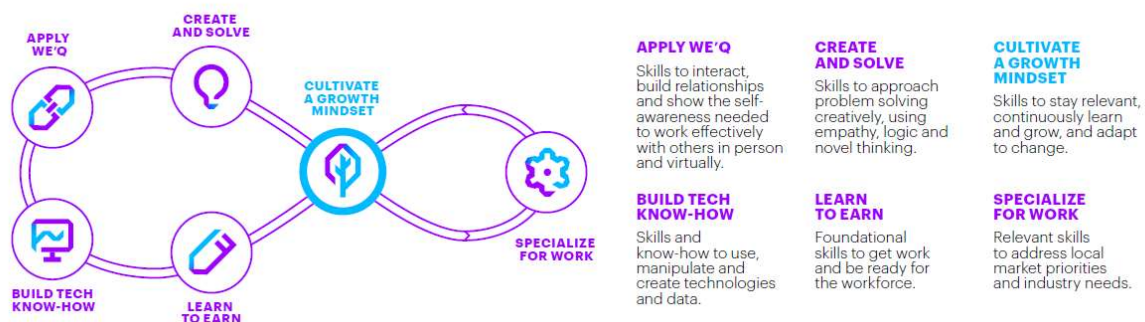


Figure 34 Accenture’s Six Skill Family Taxonomy for Future Critical Skills

## Work Futurists:

The concept of futurists is not new, starting with Filippo Tommaso Marinetti and his 1909 *Manifesto of Futurism* and evolving into Alvin Toffler’s newly coined term, ‘future shock’. According to Mullins (2009), futurists look for clues in the present to help guide organisations’ decision making and strategies for the future. They are adept at detecting upcoming uncertainty and attempting to manage it, recognising that the future will be shaped by currently unknown and unknowable forces. The following section overview



the work of a selection of high-profile futurists and their outlook on the role L&D might play in these new-world scenarios.

Gratton and Scott (2016) examine the ramifications of rising life expectancy on individuals, organisations and businesses, arguing that longer life spans will require people to reconsider their career trajectories, finances and retirement plans. In their view, people will have to continuously learn and acquire new skills in order to stay competitive in a rapidly changing labour market.

Moreover, the traditional three phases of an individual's life – education, employment and retirement – will fade into posterity, replaced by continuous reskilling in the wake of increasing tech- and automation-driven workplaces. Building on the notion of a 'growth mindset' posited by Stanford University Prof. Carol Dweck, they stress the need for people to proactively seek out learning opportunities to stay relevant and ensure their employability, while offering organisations six recommendations to adapt to longer employee tenures:

1. Offer and encourage continuous development for employees throughout their careers to keep them abreast of evolving technologies and job requirements.
2. Embrace multi-phase careers in which people may opt to periodically drop out of the job market and/or pursue multiple careers throughout their lives by facilitating employees' transitions between different roles and life stages.



3. Provide flexible work arrangements in response to longer life spans and changing demographics and family structures, including part-time work, job sharing and remote work.
4. Encourage intergenerational collaboration to leverage the unique strengths and perspectives of employees of different age brackets, such as traditional and reverse mentoring.
5. Consider new approaches to retirement such as phase retirement or bridge employment to allow people to gradually exit the workforce.
6. Create a purpose-driven culture by instilling a sense of meaning in the organisation's reason for being and people's role in achieving it, and ensuring its alignment with the greater good.

Absent from the aforementioned recommendations is the assumption of training and directed learning. The authors speak of flexible environments where individuals have options to learn, build skills and make decisions on their growth and transitions. In their view, the organisation should provide the conditions to facilitate this process.

This view is echoed in *The Future of Work*, which highlights the following seven common traits of the future workforce (Morgan, 2014):

1. Flexible work environment, where people work anytime and anywhere.
2. Customised roles that allow employees to shape and define their own career paths.
3. Information is shared internally and transparently in real time.



4. Leadership roles without direct reports, with employees able to become thought leaders by creating and contributing to organisation knowledge, similar to individuals on social networks.
5. Greater use of collaboration platforms and reduced reliance on emails.
6. Able to learn and effectively apply their new learnings to new scenarios, highlight the shift from knowledge to learning employees.
7. Democratised learning, where employees can learn and teach others as they see fit, perhaps the area most relevant to L&D and HR functions.

Without a doubt, the pandemic accelerated many of Morgan's predictions, especially in terms of flexible work schedules and the democratisation of information.

Weise (2019) concurs with other experts that today's global education systems fail to adequately prepare learners for the jobs of tomorrow, calling for a new lifelong, adaptive and job-integrated approach to learning. Supported by a robust data infrastructure, these systems would enable employees to continuously develop and acquire new skillsets across their lifetimes.

As artificial intelligence, automation and other emerging technologies continue to disrupt the world of work, Autor et al. (2020) similarly underscore the pressing need for organisations to invest in learning to reskill their workers. While redefining how people work and which competencies are valued, technological progress has other ramifications,



including a generalised fear of the future and mistrust in innovation among the labour force.

As they state, cultivating an equitable labour market in which workers are able to acquire new, market-relevant skills and retain high-quality jobs will require a far deeper understanding of how adults learn, what kind of learning is effective, and the benefits of technology, whose benefits remain unclear.

A final futurist I would like to explore is Ford (2017), whose predictions on the fallout of the technological revolution and rise of automation are slightly more pessimistic and far-reaching. In his view, the fourth industrial revolution will create fewer jobs and impact every profession and career, as humans are replaced by advancements in technology. He doesn't see additional upskilling or educational reforms as the answer since organisations will also aim to optimise productivity and profit, and the number of jobs will be finite. Rather, his recommendations are socioeconomic, such as a guaranteed annual minimum wage for all.

Unlike other futurists, Ford believes the ripple effect of technology-driven disruption will go far beyond routine, unskilled or manual jobs to a broader scope of 'predictable' jobs. He posits that a human-led job, whether in medicine, law or journalism, will be replaced if an algorithm can identify patterns and learn to do it.

Whilst this version of the future might be extreme, the possibility of no skill development is one I must consider for the organisation of tomorrow.



## Conclusion

From my own practice, experience is favoured over qualifications in the field of corporate L&D, which has few to no barriers to entry. Understanding 'adult learning theory' is not a prerequisite to working in corporate learning and development. Whilst there are terms that L&D authors leverage – pedagogy/andragogy, experiential learning, etc. – there is little to show that knowledge of education and learning theory increases the likelihood of success in corporate L&D.

People are structuring learning functions based on anecdotal evidence, surveys and futurist predictions of possible changes to organisation and environment. The function of L&D and the profession often feels like a socially constructed entity, disconnected from the evidence of adult learning and research on how things should work. This brings to mind the 1966 book *The Social Construction of Reality* by Berger and Luckmann. Widely credited with creating the theory of social constructivism, they posit that knowledge and meaning are not inherent in the world but rather are socially constructed through individual and group interactions and practices.

It was far more challenging to find works on how to structure a learning team in an organisational or industry context, and how to optimally organise the learning function to manage large-scale changes in the organisation's growth or internal dynamics. In the case of books that describe the learning function's structure and organisation, recommendations are largely derived



from the authors' personal experience or research into experiences of learning leaders.

Even though L&D leaders know how adults learn, L&D functions often revert to expediency, content and the organisation's view of learning, as opposed to the positive changes driven by L&D initiatives. As remarked by Thought Leader (T59), this role of L&D could be described as 'organisational infotainment'.



## 4. Methods and Methodology

My research aims to critically examine the role, structure and remit of the L&D function in hyper-growth, digitally transforming and new tech organisations, and proffer options on how the function might better address the evolving needs of these organisations. This chapter explores the methodology and research design process of my study, as well as its underlying philosophical foundation and impact on my findings.

### Initial considerations

The first reflection when defining my research methodology is a recognition of how knowledge is created in my profession. How would I find the appropriate data on practice within these particular organisations and on others whose learning functions I hoped to influence? What experiences, processes and insights might emerge, and which could be adapted and adopted to other settings within the context of my research?

I initially considered both qualitative and quantitative methods of study, and quickly discounted the latter since by definition, it assumes the phenomena under study can be measured with numerical and statistical data (Watson, 2015). In my view, a quantitative approach does not reflect how knowledge is acquired in L&D, leading me to opt for a qualitative method. Since the procedures for conducting research stem from the researcher's philosophical and theoretical stances (Creswell, 2013), and since the choice of research philosophy is defined by the type of knowledge



explored, (May, 2011) I set out to ascertain my position and role in my project, and the appropriate theories that would guide me.

The Research Onion (Saunders et al, 2007) model serves as a guide on how I arrived at my research choices. As the authors describe, the model symbolically illustrates how different elements in the research can be examined to develop the final research design.

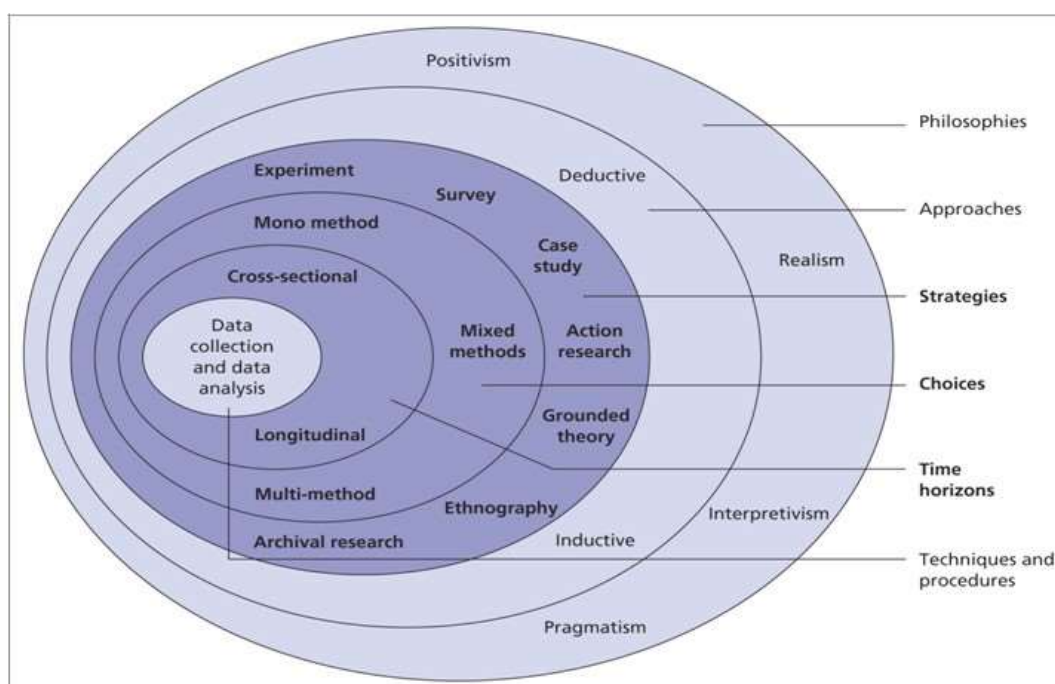


Figure 35: Research Onion Model (Saunders et al, 2007).

Revised in 2012, the model guides researchers to start from the outer layer toward the inner layer, with each stratum offering a more detailed stage of the research process. The authors view the research process as a layer-by-layer unwrapping of an onion, meaning that outer layer must be unwrapped first before reaching the subsequent one.



## Philosophy

Following the authors' recommendation, I began by establishing the philosophy of my research to represent my ontological and epistemological position. My first choice was between a positivist or an interpretivism stance.

Circling back to how knowledge is created in the realm of L&D, I ascribe to the paradigm of constructivism/interpretivism to state that my ontological belief is that, in our profession, there is no single governing theory, reality or truth. Our reality is created by individuals in groups or within in firms. I therefore advocate the epistemological belief that reality requires interpretation to uncover the underlying meaning of events, activities, and behaviours (Patel, 2015).

## Qualitative approach

In my view, corporate L&D knowledge is socially constructed and everyone's opinion and lived experience is valid. The epistemological and ontological position that there is no single reality and that we are collectively creating it led me to choose a method of inquiry that enabled meaningful engagement with L&D practitioners and honoured their unique experience and voice. By definition, this approach is qualitative.

I ascribe to the definition set forth by Lincoln (1992) and expended upon by Mason (2006) that qualitative methods focus on the whole of human experience and the individual meanings ascribed by those living the



experience, which together lead to deeper understanding and insight into complex human behaviours.

The knowledge and expertise of the L&D profession rests in the lived experience and captured thought leadership of field practitioners. This reality eliminated the positivist approach as an option, described by Dudovskiy (2022) as research in which the researcher is independent from the study, which includes no provisions for human interests.

This is not the case in my research. L&D is my practice and the research participants are my peers, with their own unique knowledge and lived experience. As a researcher, I have the context within which this is relevant to my research purpose, aims and outcomes.

As Nicolini, Gherardi and Yanow (2003) observe, organizational knowledge is rooted within a system of ongoing practices of action and interaction and facilitated by artifacts. In their view, knowledge is acquired through continually reproduced and negotiated participation, which is always dynamic and provisional. As knowledge is created in organisations through a participatory process and manifested in practice, the same framework should guide my research, both its collection and its application to context.

#### Pragmatism

At this stage, I needed to recognise the role of specific principles of pragmatism in my qualitative research. According to Salkind (2010), pragmatic studies centre on an individual decision maker within a real-



world scenario and start with identifying the problem and viewing it through the broadest possible lens to better grasp and ultimately solve the issue.

I concur with pragmatism that knowledge is socially constructed and that research outcomes should be practical, actionable, and set on inciting real-world change. That said, I struggled to identify with pragmatism in the L&D context, specifically the notion that an objective reality exists apart from human experience. I could not break down the research into a single or single set of problems 'that are part of actual social situations, could be carefully defined, and then initiate the inquiry to address them' (Kaushik and Walsh, 2019).

In the view of pragmatists, a research problem is considered legitimate for inquiry only if it is socially situated, with inquiries that are natural, situational, and grounded in problems (Dewey 1931, 1938). This isn't the case with my research – or inquiry as Dewey refers to it. I sought to impact rather than solve, to draw upon the experiences and knowledge of the community in defining my methodology and providing direction for the profession.

For me, the research questions to produce the desired or anticipated results did not eclipse the collaborative nature of the enquiry and its philosophical consideration. By gathering and synthesizing the experiences of L&D practitioners, I hope to offer new insights and pivot current understanding and position concepts within a larger picture.



This is also supported by the transdisciplinary notion that you cannot separate the inquirer from the inquiry. I am both the object and the subject of the inquiry. From a transdisciplinary perspective, knowledge is understood relationally, as something entangled that forms a larger, holistic meshwork of ideas (Montouri, 2013).

#### Transdisciplinary Inquiry and Bricolage

In his 2010 study, Montouri cites four main dimensions of transdisciplinary inquiry: 1) inquiry-based rather than discipline-based; 2) integrating rather than eliminating the inquirer from the inquiry; 3) meta-paradigmatic rather than intra-paradigmatic; and 4) applying systems and complex thought rather than reductive/disjunctive thinking. As explored in greater depth later on, I was immediately struck by the second point: the need to learn more about myself as part of my probe of a landscape within which I am immersed.

These philosophical overlaps came to the fore as I sought to establish my design, strategy, approach and choices. Convergences and interwoven ideas emerged and nothing sat as a distinct theory, bringing to mind the warnings of Senge (2006) on the dangers of breaking down complex issues into small bite-sized fragments in the hopes of better managing them. As he notes, this approach may lead us our losing the intrinsic sense of connection to a larger whole.

The world of knowledge in learning and the socially constructed reality of my profession cannot be explained through linear, siloed, unrelated forces



but rather through a process of *bricolage*, a tailored combination of analytical approaches to help the research project solve the problem under examination. (Pratt, Sonenshein and Feldman, 2020).

When coining the term 'bricolage' in 1962, Lévi-Strauss defines *bricoleurs* as 'savage minds' capable of finding beneficial uses and combinations of pre-existing things by taking advantage of whatever materials are at hand. As he underscores, they use items or concepts already in existence for purposes other than those for which they were originally intended (Mambrol, 2016). Meanwhile, the Association of Qualitative Research defines bricolage as 'a term referring to the deliberate mixing of qualitative methods and ways of thinking in order to address a specific issue or problem'.

Rather than following a single methodology or path, my research merges a blend of ideas, philosophies and methods, which together form the interwoven fabric of my thesis. As Kincheloe (2001) notes, 'Bricoleurs understand that the ways these dynamics are addressed – whether overtly or tacitly – exerts profound influence on the nature of the knowledge produced by researchers.' Indeed, the bricolage dimension of my research became even more apparent as I went through the next layer of the onion and the foundations of my reasoning.

#### [Inductive Versus Deductive Approaches](#)

It initially appeared that a simple choice of inductive versus deductive reasoning discounted the latter, as my qualitative study does not start with



a single set of facts or a hypothesis to be proved or disproved. Primarily associated with the scientific or positivist approach to research, deductive reasoning is linked with the hypothesis testing approach to research, with the argument moving from general principles to particular instances (Williamson, 2002).

This led me to question whether my study included elements of deduction despite a qualitative approach. Did my problem statement rest on the assumption/hypothesis that the L&D profession was unsuitable for the firms of the future, and did my research, in any way, set out to prove it?

The deductive/positivist approach was then firmly discounted for two primary reasons. First, the nature of the data: In the corporate L&D world, quantitative data generated is in the form of surveys of learning leaders such as Emerald Research/Towards Maturity or The Fosway Group; and the analyses of factors in the L&D function to measure a programme's return on investment (ROI), including cost, increased sales and lower attrition rates (Feedback as Proof of ROI: Best Practices for Using Qualitative Data to Complement L&D ROI, 2018).

None of the quantitative data would either conclusively prove the need for change nor offer solutions as to how to affect it. The possibility that tools might already exist to evolve the function under a particular set of circumstances is not something that would emerge from quantitative data. And finally, the information gathered cannot be generalised for all of L&D



– as would be a goal of positivist research – or even all of L&D in accelerating organisations.

I was working with a problem statement to drive change, rather than a hypothesis to be deduced or proven. The measures to assess the value of my research would stem from the dimensions of trustworthiness, applicability and transparency.

Since my research is based on problem statements to address and explore, its associated data needs to be interpreted to context. An interpretivist approach is related with inductive reasoning. As Klix (2001) observes, inductive reasoning points towards the probability of an outcome and draws possible conclusions since the event's underlying drivers are unknown, as opposed to deductive reasoning, which draws conclusions based on conditions or premises that are generally assumed to be true.

By definition, inductive reasoning is probabilistic and entails making predictions about novel situations based on existing knowledge (Hayes, Heit and Swendsen, 2010). As the authors also acknowledge, domain expertise can modify or reverse standard induction phenomena, as experts are more likely to generalize properties based on relations different from those used by nonexperts. This notion dovetailed with my research objectives, aimed at creating impact and generating ideas for alternate ways of working based on the collective but not exhaustive knowledge of my peers. Indeed, their expertise would affect the outcomes within my



context by generating narrower and therefore more credible results than uninformed opinion.

In this sense, it adhered to definitions of inductive reasoning but there still seemed to be a gap to address. Given the aforementioned bricolage nature of my research and the improbability of a uniform outcome or set of outcomes across my sample set, I decided to explore abductive reasoning.

Originally voiced by Aristotle, abductive reasoning is an inference mechanism comprised by a knowledge base and some observations by which the reasoner seeks to find hypotheses to collectively explain them (Baral, 2000). In simple terms, it is a 'best guess' founded on what we know, ascertain or observe. Abduction can be defined as the act of proposing speculative – but plausible – *conjectures* about the nature of a phenomenon.



Types	Definition	Structure	Reasoning
<b>Deduction</b>	The conclusion of an argument <i>must</i> be true if all of the premises are true. The truth of the conclusion is <i>guaranteed</i> by the truth of the premises.	All A's are B's. <i>a</i> is an A. Therefore, <i>a</i> is a B.	Uses necessary reasoning.
<b>Induction</b>	The conclusion of an argument is <i>probably</i> true based on the evidence of the premises.	95% of A's have B. <i>a</i> is an A. Therefore <i>a</i> is a B.	Uses probabilistic reasoning.
<b>Abduction</b>	We have reason to suspect that the conclusion of an argument is worthy of pursuit based on an observation.	The surprising fact C is observed. If A were true, then C would be a matter of course. Therefore, there is reason to suspect that A is true.	Uses contrastive reasoning.

Figure 36: Induction vs Deduction vs Abduction (Folger and Stein, 2017).

In my view, abduction offered a broader framework to classify surprising or unexpected responses and hence, an avenue to pursue new directions.

### Research Strategies

Once determining that my research would follow a qualitative method and an inductive approach and operate under a constructivist philosophy – with additional elements incorporated through the bricolage concept – I sought to establish the strategies that would guide the overall direction of my research and the process by which it would be conducted.



Going back to the 'research onion', I also considered experiment, survey, action research, grounded theory, case study and ethnography as options. Once again, there was a solid single strategy to align my research objectives, and elements of other strategies with the bricolage theme.

At first, selecting my strategy felt like a process of elimination. The role of L&D in a continuously emergent and shifting context of new and growing firms meant that there was no single right approach. The capacity of L&D to adapt – or not – to the pace of transforming or accelerating organisations could only be described by those living it. The data would be contextual, experiential and often argumentative. Therefore, the environment could best be explored by gathering frontline insights from a wide range of L&D practitioners.

I briefly considered a questionnaire over an interview since most participants hold senior roles and I wanted to be mindful of their time. I also wondered about the study's global reach since I would be interviewing several subjects on one-to-one meetings or calls. When comparing both means of data gathering, it was clear that conversations and interviews allowed me to better capture discursive or complex information regarding the opinions, feelings, behaviours and beliefs of my research participants (Irvine, 2018).

I also needed to consider the nature of the conversations: would they be unstructured professional conversations or semi-structured interviews based on loosely defined talking points? This was a collaborative exercise,



and the outputs would be conversations, subject to analysis to detect trends and further synthesis to combine ideas and produce new understandings and position concepts within a larger picture.

In both questions – semi-structured versus professional conversations, and whether the knowledge was established during the conversation/ interview or after data from the interviews/conversations had been analysed – I recognised the need to prevent memories of themes, data and anecdotes from earlier conversations from impacting how I conducted later interviews. How could I conduct the discussion such that participants felt comfortable narrating experiences and stories, and the flow was not inhibited by what I knew, or had learned previously?

In accordance with the bricolage nature of my research, I strived to use broad topics or questions to start the conversation and at times, to underscore their relation to my research aims, an approach more in line with a professional conversation. As my interviews progressed, however, most could be described as semi-structured, with frequently blurring lines especially when interacting with peers and participants with whom I had a greater rapport. To this end, I used a set of pre-defined questions as a guide, as well as follow-up inquiries based on participants' responses and topics of interest.

As mentioned earlier, my research integrates elements of CI yet is not a co-creation of a solution. However, the conditions of anonymity and the trust of a peer relationship offered respondents a 'safe space' for reflection,



a feature of professional conversations as described by Bergtold and Thomas (2012).

In the midst of the interviewing process, another concern arose: whether I should first complete these interactions entirely before embarking on any analysis or follow a more co-operative inquiry (CI) approach. As Reason and Heron (1995) define, CI entails interacting with others who share similar concerns and interests to better understand the broader context, and develop new and creative approaches to identify and implement needed changes.

Under this framework, those involved in the inquiry process simultaneously serve as both co-researchers and co-subjects through a reiterative cycle of action and reflection (Yorks, 2015). Whilst my research would not have cycles of data, analysis, action and reflection, the authors' description of CI perfectly describes my pool of participants and their motivations for forming part of my research.

That said, my process diverges from CI in terms of when the analysis and reflection occur, and when and how change is communicated and possibly adapted. I go back to my original premise in the selection of my social-constructivist approaches. My participants have the knowledge and experience, I have the context within which it can be analysed and applied.

#### [Waterfall Methodology](#)

In qualitative research design, researchers create their own resources for collecting data and actually gather the information, rather than relying on



questionnaires or instruments developed by other researchers (Creswell, 2014). For my research aims, I sought a methodology that allowed me to categorise my tasks into project workstreams.

Although there were distinct processes and outcomes from each workstream, they did not occur in a wholly linear fashion. There were overlaps, and the progress in one often impacted the pace of the other. I turned to project management's 'waterfall methodology' as most closely aligned to my process, whilst highlighting where my research differed.

Created by Royce (1970), the waterfall methodology comprises 'five phases of management, where each requires a deliverable from the previous phase to proceed' (Hoory and Bottorff, 2022). My research contained the following four stages:

- 1) Identify participating organisations
- 2) Identify peers to interview
- 3) Conduct interviews
- 4) Detect salient themes

The following diagram offers greater detail on the stages and their corresponding sub-stages:



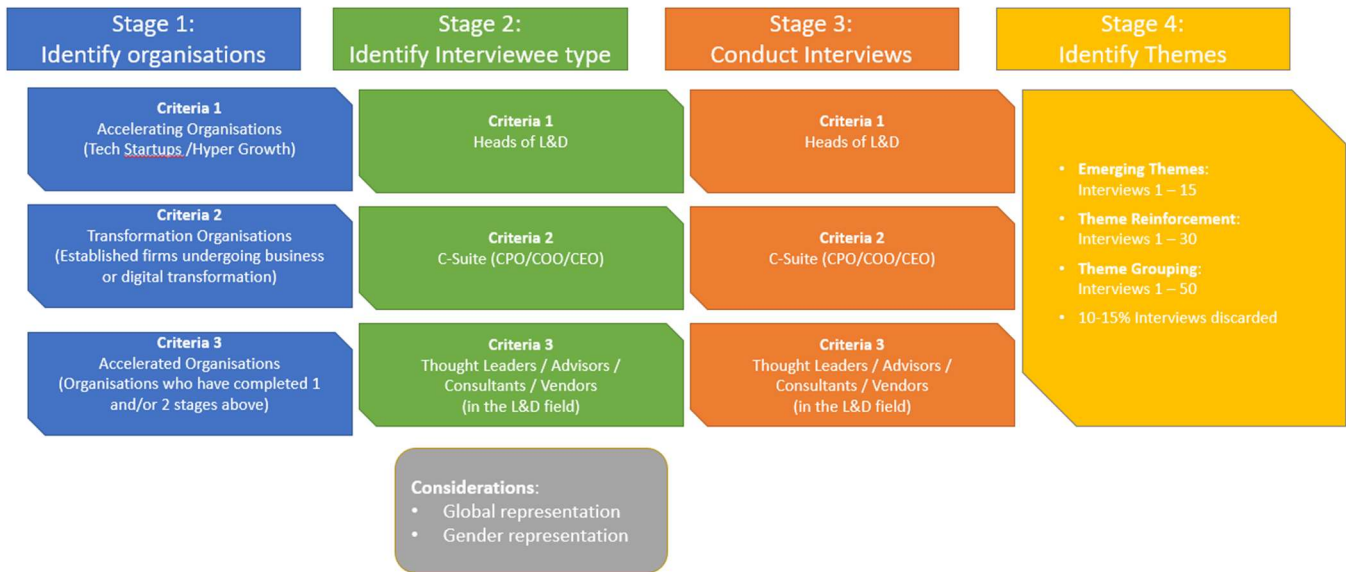


Figure 37: Research Design Phases.

These are then arranged in the sequence of a waterfall methodology to show interdependencies:

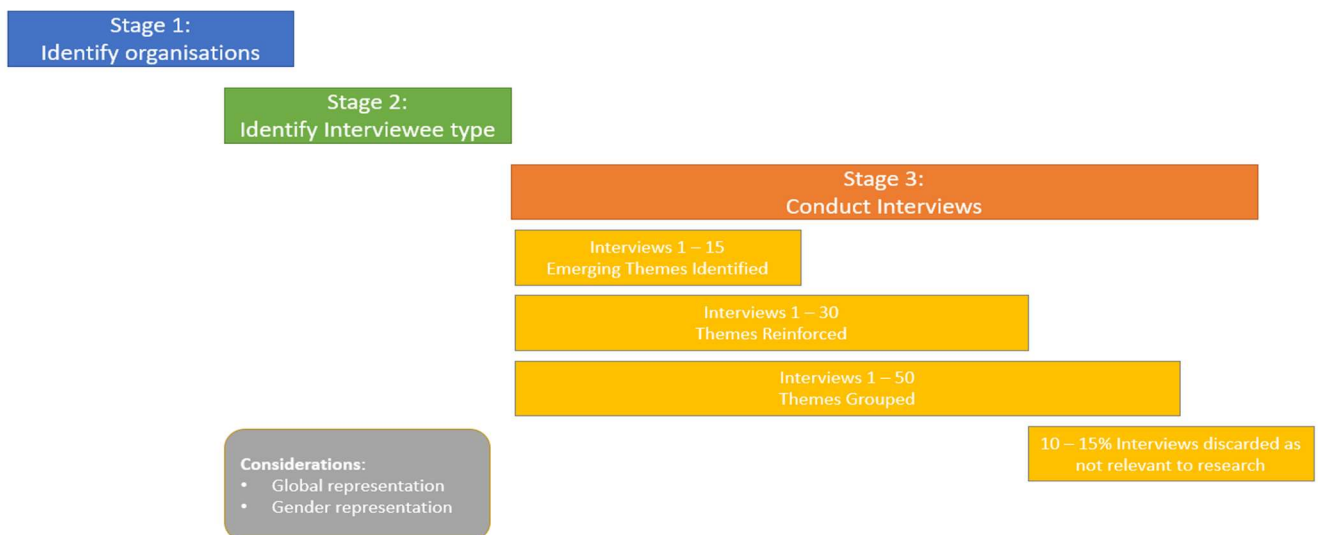


Figure 38: Waterfall Approach Project Design.

Projects following the waterfall methodology include five main phases: requirements gathering, project design, implementation, verification and



maintenance. In a traditional project management, each phase would be entirely completed before moving onto the next one, making the waterfall methodology ideal for software development projects since the end goal can be fully defined at the outset.

Whilst still following the waterfall methodology, I could foresee by stages 3 and 4 that my projects would overlap, with themes emerging during the data gathering process. According to the insights of Creswell (2014) regarding constructivist research, my personal background would inevitably influence my interpretation and position within the research. In this regard, I knew my first interview would be very different from my fifteenth, which in turn would differ from my 30<sup>th</sup> and so on. I would need to note the themes as they emerge whilst not letting them influence further data gathering in order to prevent early findings from skewing the analysis.

The waterfall approach gave structure to my project by allowing each stage to be viewed through the five-phase lens, ensuring rigor, accuracy and a consistent focus on the research project's end outcomes.

### [Defining My Research Methodology](#)

I initially intended to leverage the grounded theory (GT) methodology, developed by Strauss and Glaser (1967) to analyse specific phenomena or processes, and posit new theories based on real-world data and the dominant themes that emerged. Whilst I had forged my own views of L&D following years of practice, my research did not aim to verify or test existing



hypotheses. For this reason, a grounded theory approach was consequently discarded.

Instead, I would use a broader, inductive qualitative research approach based on an iterative cycle of sample selection, data collection and data analysis that denote the 'raw material' of the subsequent revision phase and elaboration of the research report. Whilst not the thrust of my research methodology, I also leverage the case study approach, whose possible inclusion only came to light as participants willingly shared their in-depth and often deeply personal experiences. These singular fountainheads of L&D practitioner knowledge and insight are included in Appendix 5.

As Drisko (2005) observes, qualitative research (QT) does not denote a single, unified approach, as each study is a reflection of distinct philosophies, research purposes, reporting styles and intended audiences. That said, QT research shares some common threads, including the desire to capture the essential story of the project, thoroughly convey the views of others, and specify implications.

To this end, he offers a roadmap comprised by four key elements, not all of which would apply to my research: sample selection, transferability, data collection and data analysis.

### [1 Sample Selection](#)

My selection of participants was guided by my network and research objectives. At first, the sample selection process seemed both easy and logical as I was tapping into my peer and thought leadership network.



However, the research group expanded far beyond my intended sample size.

First, I discounted quantitative sampling as an approach – defined by Jain and Chetty (2020) as a mathematical, statistical, or computational method used to generalise a phenomenon or opinion – since it did not reflect my research aims. I then classified the groups of research participants alongside their L&D role. These included heads of learning, chief people officers and CEOs in organisations which had undergone rapid growth or change (accelerating organisations), as well as L&D thought leaders.

After reviewing qualitative sampling techniques (Figure. 39), I opted for a conceptually driven approach of purposeful sampling to ensure recruiting participants with personal, frontline knowledge capable of sharing insights relevant to the research topic (Sandelowski, 1995) and reflecting on the experience of interest (Gill, 2020).

**Table 1.** Sampling Methods With Definitions.

Sampling Method	Pros	Cons
Convenience (volunteer) sampling: Potential participants volunteer to participate in the research study.	Easy, efficient, economical.	May not provide participants who can supply the best information.
Snowball (chain) sampling: Current participants recommend persons who might be willing to participate in the study.	Practical, cost-efficient, persons appropriate for study, less time to gain trust.	Quality of referrals may be problematic and/or limited.
Purposive sampling: Also call purposeful, judgmental, or selective sampling. The researcher intentionally selects participants who are knowledgeable about the phenomenon being studied. Includes maximum variation sampling, homogeneous sampling, typical case sampling, extreme (deviant) case sampling, and critical case sampling.	Ability to select participants most beneficial to the study, cost-efficient, variety of strategies.	May be challenging to locate information-rich participants.
Theoretical Sampling: Researcher samples to generate theory. Developed by Glaser & Strauss and is the hallmark of Grounded Theory (GT).	Essential to generate theory in GT studies, clarifies researchers understanding of emerging theory.	

Note. Adapted from "Nursing research: Generating and assessing evidence for nursing practice" (10th ed.), by Polit and Beck (2017).

Figure 39: Qualitative Sampling Methods.



The next step was determining an appropriate sample profile and size. In terms of the participant profile, I used a homogenous sample, which Farrugia (2019) defines as a group of subjects with similar backgrounds and experiences. In my case, these were highly experienced senior leaders with a high levels of proven expertise in the L&D field.

In the absence of a best-practice view, I decided a range of 20 to 30 participants would suffice to assure geographical, gender and role diversity. Snowball sampling, however, would become a significant issue, as participants would often suggest other candidates whose insights might benefit my research. In the end, snowballing caused my total interview population to balloon to 68 participants.

## 2. Transferability

Also known as generalisation, this premise refers to possibility of your findings being extrapolated to other contexts and is not a requisite. As Drisko (2005) notes, some qualitative research is intentionally context dependent or standpoint specific and does not seek transferability as an end goal. This was indeed the case of my research, which sought to shed light on the future of the L&D profession as it related to accelerating, tech-oriented firms.

## 3 Data collection

As Warren (2012) and Gubrium et al. (2012) observe, interviewing is a social interaction whose time, place and overall context is personally relevant the interviewer and participant. My data collection coincided with



the first months of the global pandemic, when everyone in my target audience was working from home. What started out as a necessity soon became a more freeing experience. Participants were less burdened by time constraints, and seemed more willing to share their experiences from the security of their homes.

Online interviews offered advantages, starting with the window they occasionally opened into people's lives. In some cases, interviews were stopped and restarted around children's meal and nap times, and in others, participants were very keen to share the impact of past and present workplaces on their health, family and personal life. Whilst these tangents didn't always tie into my research objectives, they definitely generated a richer data set by allowing me to establish deeper relationships with interviewees.

Another benefit of using an online channel was its underlying information and communications technologies (ICT) technology, which simplified the recording and transcription of these interactions, as well as my ability to review non-verbal communication cues. In parallel, its interview and data collection features leveraged the same thinking and informed consent involved in any type of research and qualitative interview research in particular, with the added benefits of technology (Salmons, 2012).

#### *Interviews as a research methodology*

Interviewing in the field of social sciences traces its roots to the early 20th century (Fontana and Frey 2004), and since has grown as a core research methodology. From anthropology and education and social psychology, it



has gained traction across a broad spectrum of fields to become 'the favorite methodological tool of the qualitative researcher' in the words of Denzin and Lincoln (2004, p. 353).

As the popularity of interviewing grew, investigators turned the spotlight on the interview itself as a topic of research. In his 1998 study, sociologist Clive Seale outlines two major traditions – interview data as a resource and interview data as a topic – which he describes as follows:

**Interview data-as-resource:** the interview data collected are seen as faithfully reflecting the interviewees' reality outside the interview.

**Interview data-as-topic:** the interview data collected are seen as faithfully reflecting a reality jointly constructed by the interviewee and interviewer.

The validity of the interview as a data-collection tool has been viewed through both positive and negative perspectives. Supporters of the constructionist tradition find fault with the interview-data-as-resource approach. As Dingwall (1997, p. 56) states, 'the interview is an artefact, a joint accomplishment of interviewer and respondent. As such, its relationship to any "real" experience is not merely unknown but, in some senses, unknowable'.

Through this lens, the output is considered a co-creation emerging from the interaction between the intervening parties and an artificial construct not necessarily reflective of reality. In the case of the interview-data-as-topic approach, proponents believe it is both possible and desirable to



downplay the interactional framework of the interview to elicit more natural responses from participants.

Here it is worth highlighting what is accepted as 'truth' under both constructs. In the case of the interview-data-as-topic model, interview data is treated as a joint construction and not necessarily deemed an objective truth in recognition that interviewees may be contradictory, influenced by the interview context and prone to selectively framing their responses. The aim is to explore co-constructed identities, not to ascertain facts.

By contrast, the interview-data-as-resource approach considers the subject will produce an account which is coherent and consistent with an outside reality, and hence accepts interview data as 'truth'.

Most structured and some semi-structured interviews follow the 'interview data-as-resource', assuming that the collected data reflects interviewees' knowledge and experience of the outside world. That said, a combination of both approaches – one that treats interview data as both resource and topic – may be beneficial, with investigators placing more weight on one or the other depending on their research context.

#### *Semi-structured interviews*

Interactions were conducted as semi-structured interviews, with key topics and questions used as a guide. This approach aligned with both the bricolage dimension and the role of professional conversations in my research, wherein participants' engagement reflects their adaptive expertise and introspection, and the development of a collaborative space (Jarrett, Cooke, Harvey and López-Ros, 2021). At the same time, it ensured



I could control the direction of the conversation for the purposes of my research.

According to Fylan, semi-structured interviews are conversations guided by the researcher's specific aims and lines of inquiry, although with the flexibility to change tack depending on the participants' contributions (Miles, 2005) and exchange of insights, allowing the researcher to problem other topics and directions (Wilson, 2012).

Borg and Gall also emphasise the advantage of a semi-structured interview as a reasonably objective approach that still permits gaining a thorough understanding of the respondent's opinions and how they were formed (Borg and Gall, 1996). Introducing the rationale of semi-structured interviews allowed me to have open professional conversations, whilst still being guided by loosely regulated questions to adhere to the context and purpose of my research and ensure fairness as I moved from one interview to the next.

As mentioned earlier, all interviews were conducted via Zoom. According to Hewson (2010), interviewing is a form of primary internet-mediated research, with secondary research comprising the use of existing documents or information sources found online (Stewart and Stewart, 2014). Salmons' depiction of the flow of an ICT-based interview closely follows my approach of a semi-structured interview with elements of professional conversation. See Figure. 40



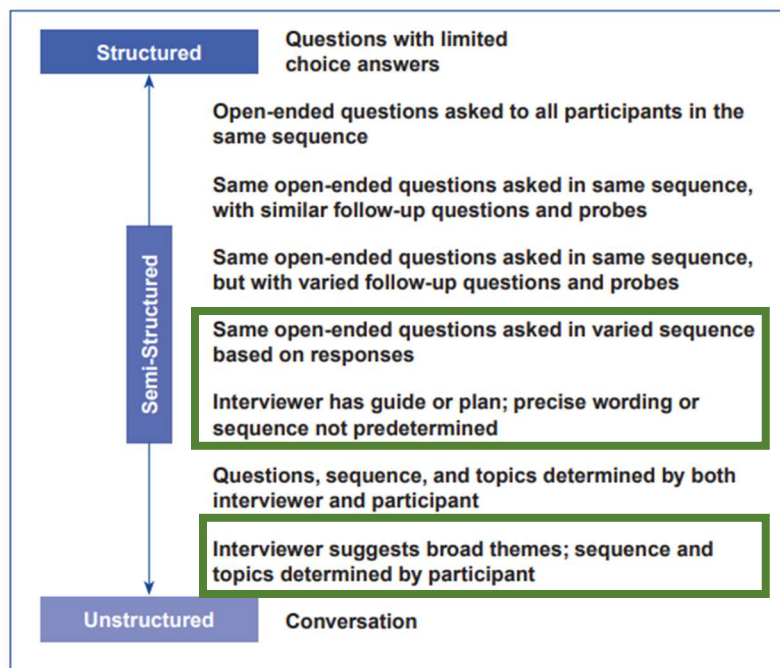


Figure 40: Level of Interview Structure (Salmons, 2010).

- **Interactions during interviews:**

The term 'creative interviewing' emerged in the 1980s to define flexibly conducted interviews that responded to situational dynamics as opposed to following a rigid, predefined structure (Douglas, 1985). Drawing upon Douglas' work, Mason defines creative interviewing as qualitative, flexible, semi-structured and non-standardised to build data and knowledge through processes deemed 'creative' in some way (2010).

These definitions are important since interviews served as the primary foundation and main tool in my research. All data and knowledge gained from these conversations rested on the relationship established with my peers and wider community of practice.

In my case, I had no prior relationships with interviewees as a researcher. Although I had previously collaborated with some of them, none had seen



me in an interviewer role nor as an academic researcher. The tone of the interview and the social interaction within would play an important role in establishing my credibility and affirming my intent of an outcome for our profession.

After conducting the first 20 interviews, I began to discern the emergence of common themes and 'rough findings', which I jotted down to ensure they didn't influence future interviews. In this sense, the work of DeVito (2002) on successful listening offered a framework to help me process these takeaways more reflectively.

As he outlines, effective listeners are able to simultaneously manage several different mental tasks, which he breaks down in his five-stage listening model (Figure 41): receiving, understanding, remembering, evaluating and responding.



Figure 41: Listening Process, DeVito (2002).

**(a) Receiving:** This stage entails a deliberate focus on the speaker's message, including filtering out incoming stimuli that might cloud the communication. As seen in the diagram, an ear symbolises this stage as



the primary tool to assuring that the message is heard and that the process can continue onto the next stage.

As my research was largely conducted via at-home interviews at the onset of the pandemic, the 'receiving' stage sometimes demanded greater effort on my part when participants' domestic life crept upon the scene.

**(b) Understanding:** Listeners try to make sense of the message in phase 2, which is not always easy if the speaker doesn't always clearly enunciate. Other factors may influence this process, namely, the perceptions and experiences of the listener, who might unconsciously attach their own meanings beyond the speaker's words.

This possibility – which increases proportionally if the listener's experiences and background differ greatly from the speaker's – is also captured in the diagram, which uses an image of a brain in stages 2, 3 and 4 as the main instrument of listening. I made a conscious effort to bear this risk in mind, even though my subject group primarily comprised peers in the L&D field.

**(c) Remembering:** In the third phase, the listener either commits the speaker's message to long-term memory or discards it. In the first case, effective remembering starts with an effectual 'receiving' of the message, Wolvin and Coakley (1996) observe. As they note, the most common culprit for inaccurate remembering is inattentive listening, which may arise for any number of reasons, from momentary distractions to the inherent difficulty in processing highly complex messages.



Whilst I did my utmost to listen attentively to my research participants, if necessary, I could rely on the back-up support of interview recordings to clarify any messages.

**(d) Evaluating:** This phase refers to listeners' value assessment of the speaker's message, which may result in vastly different judgments depending on their personal backgrounds, opinions and perspectives. Whilst I consider myself to be open-minded, I stay attuned to any internal biases that might influence the listening process.

**(e) Responding:** The fifth and final stage is the listener's feedback, which may be verbal, non-verbal or a combination thereof. Responses occur throughout the interaction as formative feedback, defined as cues such as focused attention, nodding and note-taking to indicate the listener is engaged in the speaker's words.

The end of the exchange is conveyed through summative feedback when listeners indicate their appreciation, alignment and/or disagreement with the speaker's message, as well as verbal and non-verbal cues.

The interviewing process and data-collection component of my research, in addition following the general framework of listener and speaker, would also entail reflective practice and critical reflection (Fook, 2016), particularly since both parties belong to the same professional sphere.

Often used interchangeably, these interactions share common traits, such as a continuous scrutiny of practice – in this case, the L&D profession – their underlying assumptions. That said, there are nuances between them.

To bridge the gap between formal theory and real life, critical practice aims



to enhance practice by discovering the actual theory embedded in professionals' actions rather than their accounts of what they do (Lishman, 2007).

Critical reflection, on the other hand, is broader in scope, transcending the professional realm to include all aspects of living. Based on Socrates' 'examined life', it entails the ability to question one's core beliefs and assumptions, and translate newfound perspectives into action.

When conducting interviews, these concepts would significantly influence my understanding of participants, their lived experiences and how they shaped their and my perceptions of the L&D profession. Throughout the interview process, I needed to stay fully focussed on the process and resist the urge to critically examine and compare them within my own context.

Participants would need to feel completely at ease to unreservedly express their views and believe they had a full listener who would fairly represent them. For this reason, I needed to fully understand the distinct elements of the interview process and seamlessly leverage them, from active listening to capturing both verbal and non-verbal cues for later examination.

In this regard, I chose to not transcribe any interviews until all were completed, and only kept a diary to note recurring themes, a process outlined in greater detail in the 'Project Activity' chapter.

#### 4 Data analysis

The interviews conducted would lead to rich data in the form of transcripts, which were subsequently cross-reviewed against literature and prevailing



theories. These records would be examined using thematic analysis, with data divided into themes and sub-categories following Marshall and Rossman's (1999) six-step approach to designing qualitative research:

- A) Data was organised into themes to gain a deeper understanding of its content and nature as a body of work.
- B) Uni-dimensional and multi-dimensional categories/themes were further defined based on emergent patterns from literal and interpretive data reviews.
- C) Data was systematically coded based on my interpretive reading and overall content analysis via visual techniques, including colour coding and sub-chapter topics to better organise the work. In cases where the data is clear, I sometimes assigned a numerical value to chart or visually illustrate a dynamic or finding, thereby ensuring an audit trail of how I arrive at each theme.
- D) Emergent understandings of the data were tested as I begin to develop theories, compare them to prevailing theory and observe gaps.
- E) Alternative explanations were sought, with emerging theories critically analysed using a grounded/inductive method to determine other interpretations of preliminary conclusions.
- F) Findings were summarised using the project-based themes and subcategories developed during previous stages, including the charting/graphing of quantifiable findings.

I also employ the six-step process developed by Braun and Clark (2006) to search for themes or patterns in my data. The first four of these six steps – getting familiar with the data, generating initial codes, searching for and



reviewing themes – are outlined in this section, while the remaining two – defining themes and report elaboration – are included in the 'Creating Solution Sets' section:

**1 – Familiarization with the data:** After completing and transcribing all the interviews, I iteratively review them to gain a deep understanding of their content and the messages conveyed through both verbal and non-verbal communication, while keeping in mind the category of respondent.

**2 – Generating initial codes:** This step involves detecting preliminary codes, which are features of the data that the researcher finds especially meaningful and insightful. These codes are more general in nature and ultimately serve as a signpost for themes.

Following the aforementioned work by Strauss and Corbin, Qureshi and Ünlü (2020) created a sequential four-step grounded theory coding instrument to help with this process:



*Figure 42: GT Coding Instrument.*

- Codes: labels ascribed to the data extracts based on what they indicate.
- Concepts: interpretive words that cluster codes which reflect similar ideas.
- Categories: higher-level patterns detected after an iterative process of comparing and contrasting the concepts, more abstract than the concepts they represent.



- Themes: the highest level of abstraction, these are actively constructed patterns or relationships derived from the data set that respond to a research question.

**3 – Searching for themes:** I relabelled the terms using these definitions and adapted them based on the evolution of my research. The words or codes sometimes overlapped with the concepts or directly moved into themes. Depicted in the following diagram, my research followed the Qureshi and Ünlü process, although stops short at proposing a new theory or a single positivist view of future concept or action.

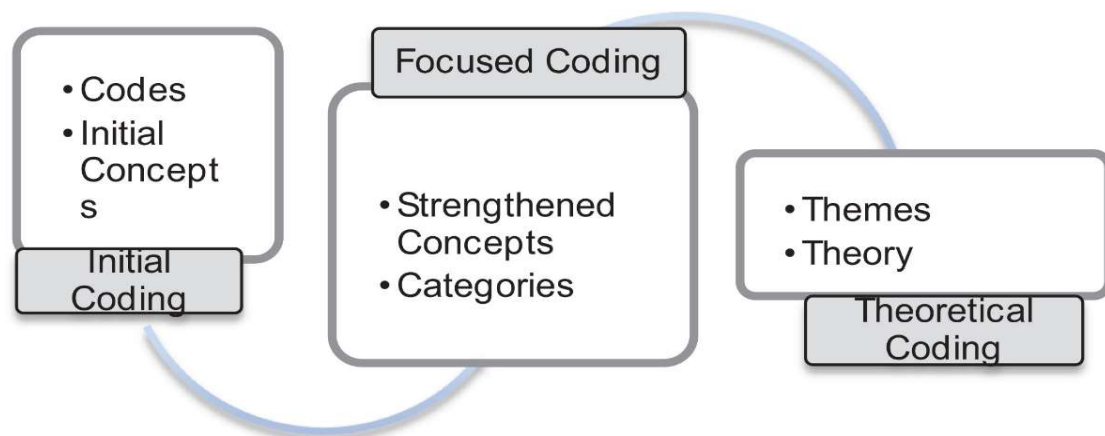


Figure 43: Moving from Codes to Themes (Qureshi and Ünlü).

**4 – Reviewing themes:** As noted by Varpio et al. (2017), themes do not manifestly emerge from the data but rather are pulled out and constructed by the researcher after an in-depth process of analysis, comparison and thematic maps to visually show cross-connections between concepts and themes.



Following the recommendations of Strauss and Clarke, I aimed to be as inclusive as possible and took note of all potentially significant themes as the most relevant wouldn't reveal themselves until a more in-depth analysis.

### [Ethical Considerations of My Research](#)

Three groups emerged when considering the broader ethical implications of my research: individual learners, L&D professionals and the organisation. I then examined these considerations within the ethical context of two broad headings: my approach or procedure, and the practice of my research and profession.

My first instinct was to eschew the topic of individual learners and their learning experiences to avoid the need to review personal development plans and employee performance measures, thereby eliminating privacy and data protection considerations. For the aims of my project, I decided to follow procedural and organisational knowledge rather than solely individual experience (Brown, 2015), although arguably I tapped people's individual experiences when interacting with the L&D leaders in my subject group.

That said, my focus was not the learning modality of the individual but rather the structural areas of the L&D function through the lens of the L&D professional. Whilst optimal for my research aims, as an L&D professional, I have long been concerned with employees' common perception of training and learning as something done 'to' them or mandated via a top-down



approach, as well as their potential sense of distance between my ultimate recommendations and their needs. In this regard, I trust my findings will benefit the industry without detriment to the individual learner yet recognise the need for a more in-depth exploration.

**Integrity:** Given the ultimate goal of potentially transforming the remit of my profession and creating impact at a broader level, it seemed more prudent to centre on an organisational approach since, in addition to examining the learning policy and artefacts of the organisation, I would interact with peers on equal footing in terms of the current challenges in the L&D space and how they affect us. Kant called this the categorical imperative (Oliver, 2011). I agree with this approach, firm in my belief that my role as a researcher doesn't supersede that of participants who generously provided me with the data.

Then follows the true ethical dilemma in the intended and unintended consequences for those who freely shared their knowledge, experience and expertise with me: I might make recommendations that question the long-term validity of my peers' skills. Consequently, it was important to consider how I would frame my subjective views regarding the relevance of the L&D skillset and role, and whether interviewees might deem them a violation of informed consent by participating under the guise of advancing our profession and emerging with the notion of collectively contributing to its demise.



I am also aware of my reliance on the goodwill of participants, with whom I may have relationships or access to via my network before, during and after the study. And whilst I expected my colleagues to offer thoughtful opinions based on my research question and approach, I recognise they might have been influenced by a protectionist view of our profession or framed their responses based on our relationship. Although these reflections did not change my approach, my awareness of them in the ethical context was an important consideration during my research.

From the Industrial Revolution to globalisation and the current automation age, every social transformation has winners and losers, those who benefit from change and those who are left behind (Rosen, 1998). From this perspective, I strived to select research subjects with care, considering their credentials, qualifications and experience, and did my best to avoid personal bias in my conclusions by adhering to my personal moral code, desire to maintain credibility and the university's code of conduct for the doctorate process.

Throughout, I was aware of those not included in my study whose careers and roles might be impacted by my work. In this vein, I realise that the learning structures suggested are based on a collective set of subjective judgements and insights, both my own and those who kindly took part in my research. Would everyone in the organisations benefit equally? Among the limitations of my organisational approach is the inability to examine the



impact by role and categories by seniority level. Who am I overlooking in this mix?

Finally, the larger social picture. My research explores accelerated and accelerating organisations, many of which are automating their processes. Against this backdrop and the marked upswing in technology-driven companies, I have focussed my attention on learning for those employed and employable in both. I do not consider the social repercussions caused by the rapid release of employees. As I proceed, I will be mindful of those excluded from this definition, whilst maintaining the workforce of the future in sharp focus.

As Hatton and Smith (1995) posit, reflective action is intricately tied to persistent and careful consideration of practice against currently held beliefs to integrate and advance knowledge with an open-minded, responsible and committed approach. I believe that awareness of the ethical implications of my research – my attempt to remain mindful of them and my potential biases and assumptions – has been vital to the authenticity and objectivity of the findings.

As addressed in depth in my MORE application, I also diligently adhered to the core principles of researcher ethics as my research progressed in the following ways:

- i. Protecting research subjects through honesty, integrity, confidentiality and respect for intellectual property.



- ii. Conducting my research using legal and objective methods to better serve the interests of the people and companies involved.
- iii. Meticulously reviewing my research methods for ethicality, validity and appropriate scope.

Last, but not least, I was particularly conscious of my responsibility to produce a unique, non-imitative, body of scholarly work based on the authoritative and empirical knowledge collated in my research findings and did my utmost to apply clear logical reasoning in my conclusions.

### Summary

My research followed a mixed approach of qualitative study, wherein the data gathered was factual as communicated by the research participants for their places of employment or organisations of collaboration, and anecdotal through their opinion and lived experiences.

The analysis focused on identifying and articulating the key challenges or needs in introducing or transforming the L&D function. Narrated data collection and analysis followed both central tenets, focusing on the rich details gathered in recording events, interviews, business observations and the use of multiple data sources.



## 5. Project Activity

This chapter offers a process overview of my research project. The interviewing activity was a learning experience; I examine its diverse paths, when I had to review my positionality and when I realised my process was slowly starting to change. The fundamental aim of my thesis remained unchanged: through the lived experiences and stories of my research participants, I would critically examine the role, structure and remit of the L&D function and proffer solutions regarding how the function might better address the evolving needs of accelerating organisations.

In terms of my process, I leverage the waterfall project methodology design, outlined in the previous chapter, explaining the specific actions in each stage, their evolution over the course of the project, and their impact on my research and conclusions.

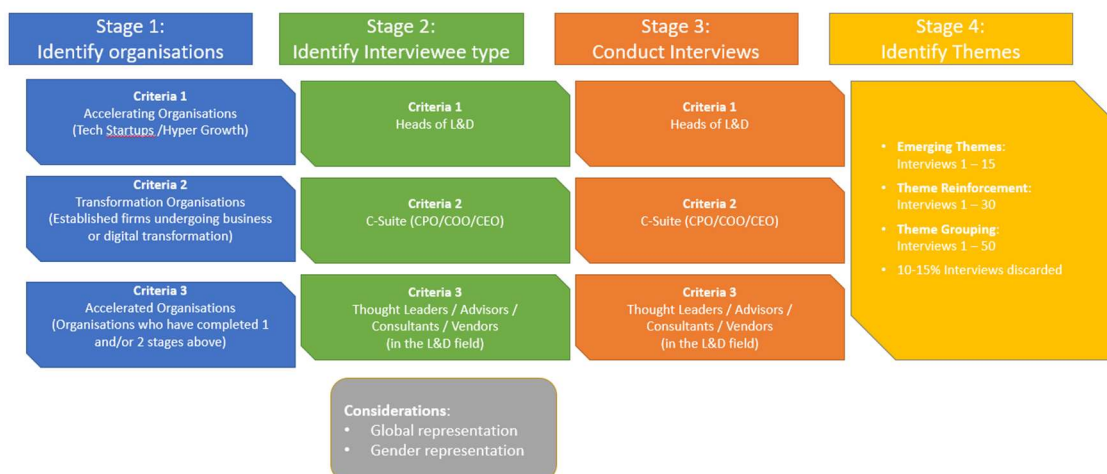


Figure 44: Research Design Phases.



## Step 1: Identifying the Organisations

I began the research in the second quarter of 2020 as the COVID-19 pandemic swept through the world. Since I was not working at the time, I decided to dedicate the interim to full-time research, with the aim of completing my interviews by the end of the year.

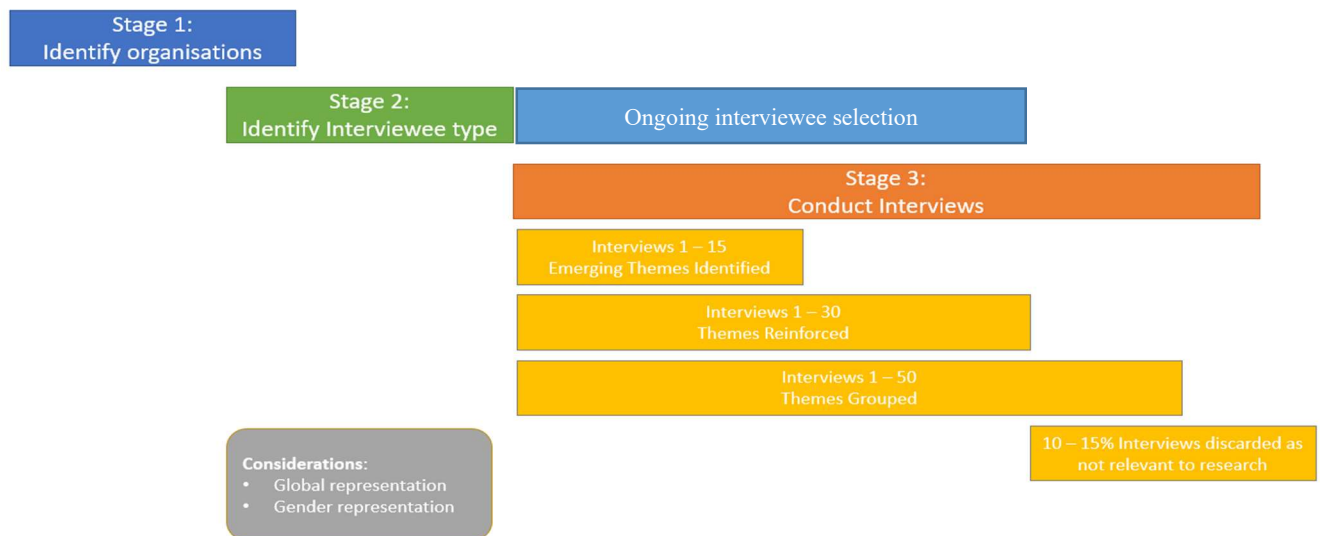


Figure 45: Waterfall Approach Project Design.

At the start of my research journey in 2018, I decided to focus on accelerating organisations as mentioned in the introductory chapter. As my research progressed, I developed and sharpened my definition of accelerating organisations:

- **Technology firms in start-up mode seeking to secure funding or having just secured it in the initial stages of pondering their organisation structure and team expansion.**

*Forbes Advisor* defines start-ups as 'young companies founded to develop a unique product or service, bring it to market and make it



irresistible and irreplaceable for customers' (Baldrige and Curry, 2022), while Durban (2021) describes them as 'companies that are innovative or that make use of new technologies' wherein it has to 'invent its own processes its own business model, to succeed in stabilising it and to grow rapidly often sacrificing short-term profitability'.

My criteria for accelerating organisations also included firms in hyper-growth or scale-up mode, which were evolving from the start-up phase to a steep growth trajectory phase, either prompted by increased funding (additional investment or IPO) or a sharp upswing in demand for their product or service. A firm's shift from start-up to scale-up stage varies. According to Techpoint, a start-up is 'a company that is newly established as a necessity in the market, generally in the technology field, with growth potential', whereas a scale-up is defined as 'a relatively young, rapidly emerging, innovation-driven company' that has experienced a high level of growth over the past three years (Golding, 2002).

One way of qualifying this process is by classifying firms based on a set of common criteria, the primary being annual growth. 'A scale-up must register a team growth of more than 20% per year, with at least 10 employees on permanent contracts. In terms of turnover, a scale-up is expected to generate between \$1 million and \$3 million. It must also have already raised at least \$1 million' (Ries, 2019). EarthWeb and



EmBroker estimate the annual number of global start-ups at 305 million, with only 10% successfully transitioning from scale-ups and full businesses (Wise, 2022). I kept these criteria in mind when reaching out to my network and selecting interviewees.

My research dovetailed with my most recent corporate position as the global head of learning and talent at a tech scale-up. In this role, I had the chance to gain firsthand experience shaping the trajectory of people growth and development, which also helped me refine my criteria on the types of organisations I wanted to research.

- **Firms which had significantly modifies their operating models and core offerings as a result of digital transformation or technology-driven change**

These are generally large, established multinational organisations with over USD 1 billion in revenue that seek to reinvent themselves and boost their relevance in today's market and world by harnessing the power of technology. MIT Sloan divide the digital transformation process into three concurrent or overlapping stages: (1) transforming customer experience (2) transforming operational processes and (3) transforming business models. They further break down these stages into nine areas of change, all critical to the success of digital transformation processes: (Westerman et al., 2014):

1. Customer understanding
2. Enhanced sales pitches



3. Customer touch points
4. Automation
5. Virtualising individual work
6. Performance management
7. Digitising the businesses
8. Introducing digital products
9. Digital globalization

One distinct market example is Shell, the global oil and gas giant, and its investments in technology for renewable energy solutions, use of machine learning and AI to optimise its sourcing of traditional fossil energy, and implementation of technology to decrease its carbon footprint, leading to a reduction of over 50% [Shell.com](https://www.shell.com). Another example is Philip Morris, the global tobacco giant, investing in technology to create an entire line of smoke-free alternatives including non-cigarette, electronically controlled tobacco heating and e-Vapour products [PMI.com](https://www.pmi.com). These decisions are more than merely strategic and operational; they entail a paradigm shift in the organisation's people and culture in order to accelerate change and promote its adoption.

I sought to gain an up-close understanding of how the heads of HR, learning, operations and culture operated in these environments, and how their teams and offerings were evolving to reflect organisational change. These types of organisations were included in my research for this purpose.



Having defined the criteria of accelerating organisations, I kept the parameters broad to capture a wider range of experience. I therefore could speak with a diversity of interviewee profiles, such as a COO of a start-up expanding from 13 to 50 people and from three to seven countries; a CPO who had managed a scale-up to IPO; and a CLO leader of an energy company in the midst of a major digital transformation.

#### [Step 2: Identifying the Interviewees/ Ongoing Interviewee Selection](#)

After establishing the organisation profile, I first focused on the criteria needed for my research aims, which informed the formulation of my interviewee profile. In this section, I discuss the rationale and criteria behind the selection of participants. I will also delve deeper into the operationalising of the purposeful sampling strategy mentioned in the Methodology chapter.

#### [Interviewee Criteria](#)

In order to solve for the accelerating organisation, I would have to understand its current landscape and strategy for growth, and its influence on the people strategy in general and organisational learning in particular. Whilst L&D recognises the importance of alignment with business strategy, we have struggled to show how we align and help businesses achieve it. According to Brandon Hall Group's *2020 Learning Strategy Study*, 87% of companies believed L&D alignment with the business strategy was either important or critical to achieving business goals, yet only 13% said 'they were ready to take action on creating it'. As the study noted, companies are largely in the dark in terms of learning by designing programs based



on training requests rather than ensuring their alignment with organisational objectives (Wentworth, 2021).



Figure 46: Brandon Hall: To What Degree Do Each of the Following Apply to Your Organization's Current Learning Strategy?

I aimed to make the connection precisely at the discovery phase. To start with the organisation and its ambition: where it sees its business and growth, and the concrete role of people and their development to ensure its success. This knowledge would therefore need to come from those with lived experience in the development, transformation and acceleration of the firm. It would derive from those whose vision created the firm and/or set the strategy for its expansion and/or transformation, and thus would involve a senior-leadership level. As I identified the most relevant organisational roles, I created a series of discussion points to help steer the conversation during the semi-structured interview, allowing space for participants to freely share their knowledge and experience. These insights became part of my first interviewee map:



Role	Discussion Points
<b>Chief Learning Officer (CLO)</b>	<p><b>Organisation</b> Tenure in the firm: To kick-off – I'm looking at the role of the CLO in a technology accelerating organisation and how it changes in varying growth circumstances</p> <ul style="list-style-type: none"> <li>• What does learning look and feel like in your organisation and how did you shape it?</li> <li>• How does organisational learning 'show its face' in your start-up?</li> <li>• What surprised you?</li> <li>• What are you most proud of?</li> </ul> <p><b>Supplementary questions</b></p> <ul style="list-style-type: none"> <li>• At what point in the firm's growth were you brought in?</li> <li>• What prompted you to join the firm? Who identified the need for the function?</li> <li>• How did you go about building the function?</li> <li>• What was the size of your team at its maximum? How did this change with organisation size?</li> </ul> <p><b>Key outputs and achievements</b></p>
<b>Chief People Officer/ Chief Human Resource Officer (CPO/CHRO)</b>	<ul style="list-style-type: none"> <li>• Talk me through your experience setting up the People function in a start-up and your decision to introduce L&amp;D</li> <li>• How did the role and function interact with the organisation – what was its remit and scope</li> <li>• The role in the employee lifecycle</li> <li>• Your main observations on L&amp;D in a start-up</li> </ul>
<b>Chief Executive Officer/ Chief Operating Officer/ Founder (CEO/ COO)</b>	<ul style="list-style-type: none"> <li>• Tell me about your journey, from forming/joining the organisation to where it is now</li> <li>• How did you go about building your team?</li> <li>• When did you bring in your first people leader and in what capacity – HR/Talent/L&amp;D – and why?</li> <li>• What is your vision for your firm?</li> <li>• How do you see the role of the workforce in your firm's growth?</li> <li>• How do you view the positionality of the people function/s in order to achieve this?</li> <li>• Would you have done anything differently in this regard? What are your big learnings on the role of HR and L&amp;D?</li> </ul>

Figure 47 Discussion Points by Organisation Interviewee Role

My focus wasn't on those who consumed courses or used L&D products and services of within the organisation (i.e. employees and end-user functions) since in my experience, traditional ways of measuring learning



effectiveness centred on how much employees 'liked' the programme or how much time they had dedicated to the learning system (more details on learning effectiveness measurement can be found in the 'Findings' chapter). At this stage, I did not want opinions biased by the last user experience; rather, I wanted a more strategic viewpoint from those who could influence the budget, direction and structure of both the organisation and the envisioned role for the learning function in its growth and success.

In addition to the aforementioned groups, I wanted to get insight from those who worked with the learning function but did not form part of the firm: consultants who were former people leaders themselves, authors of books and theories on corporate adult learning, and thought leaders who could provide an outside-in view of best practices with regards to learning in accelerating organisations.

My thinking was that, as advisors, these individuals would have observed, worked with and supported several such firms across the board, and their participation would expand my reach and the anecdotal evidence from organisations. I sought out those who, whilst commercially sold their advisory services to organisations, also contributed to the profession by providing thought leadership, writing books or white papers, and serving as lecturers and speakers at L&D conferences or events.

In this process, I was very aware that several may have written their books or conducted their research within the context of more traditional organisations. In this sense, they might not have relevant insights or experience regarding my concept of accelerating organisations, or might



have under-researched or underrepresented them in their texts. Often, I selected those whose work had resonated with me, having manifested similar concerns on the L&D function through public calls for change in their speeches or writings.

In my view, these leaders could indeed advocate for new or different directions, yet exert a limited influence as they didn't form part of the organisation. I also considered their voices might not necessarily reach the organisational leadership beyond the people function, and realised that one of the activities in reviewing my interview transcripts would entail discerning the innovative from the traditional perspective.

I chose to exclude providers of specific L&D products to firms, therefore discounting learning management system (LMS) or learning experience platform (LXP) vendors, content development organisations and content library sellers. I didn't want my research descending into a 'choice of vendor' discussion, choosing instead to concentrate the focus on supporting the right strategic choices for introducing and structuring learning in the organisation. In some instances, the aforementioned snowball sampling effect led me to interview a few vendors. I used the time to establish their contribution to the profession beyond their product, and gather their experience and thoughts on L&D separate from their offering. When not possible, these interviews were discarded, as explained later in this chapter.

This approach expanded the Interviewee Table and Discussion Points as follows:



Role	Discussion Points
Thought Leaders/Authors/Consultants	<ul style="list-style-type: none"> <li>• Tell me about your role and interaction with the L&amp;D function in firms</li> <li>• Articulate the trends you are seeing in the L&amp;D landscape</li> <li>• How are the CLOs you work with changing?</li> <li>• Is there anything different you have observed about L&amp;D in newer organisations?</li> <li>• What are firms doing differently now in their approach to L&amp;D?</li> <li>• Describe your view of the L&amp;D professionals' 'market' at the moment, such as their skills and relevant experience</li> <li>• How is technology impacting people development decisions?</li> </ul>

Figure 48 Thought Leader Interviewee Discussion Points

### Diversity Considerations

Much emphasis has been made on the necessity for diversity in research samples. Historically and globally, up to 80% of research participants could be described by the “WEIRD” acronym — white, educated, and from industrialized, rich and democratic societies despite only approximately 12% of people around the world reflecting this social profile (Willis-Wallace and Bell, 2021). Demographics factors such as ‘ethnicity, sexuality, gender, and economic status’ are recognised as possible markers for significant cultural differences which could play an important role in the study of the social phenomena addressed in qualitative research’ (Allmark, 2004).

As someone from a diverse background operating within a global context, I needed to ensure diversity in the sampling. Diverse research participants inform research results by reflecting our heterogeneous society. As Willis-Wallace and Bell (2021) observe, the presence of diverse researchers



promotes trust among diverse participants, who feel more at ease when interacting with people with whom they can identify.

Numerous organisational studies indicate that diversity is an asset for both businesses and their employees by advancing innovation, creativity and empathy less likely to emerge in homogeneous environments (Eswaran, 2019). A study by the Boston Consultancy Group supports this conclusion, finding a significant correlation between diverse leadership teams and overall innovation revenues, which on average were 19% higher than firms with below-average diversity. In the opinion of Lorenzo et al. (2018), this finding is significant for tech companies, start-ups and industries where innovation is the key to growth since it highlights diversity as a core component of positive corporate outcomes rather than merely a box-checking metric to attain.



Figure 49: BCG Diversity in Leadership Report.

In reflection of organisations' increasing diversity, research into how they learn and grow needs to be diverse too, with samples representative of



their diverse employee pools. Ultimately, I also wanted a research sample that not only reflected the organisation today, but was reflective of me – a woman, a leader, an ethnic minority – in the workplace.

Another consideration behind my decision to integrate diversity in my sampling was potentially leveraging the Hawthorne effect regarding people's tendency to alter their behaviour simply as a result of being observed (Sedgwick and Greenwood, 2015) or in this case, of being included. In this sense, ensuring a more diverse population in my study would allow me to collect more diverse perspectives, and potentially make my participants more receptive to my findings as a result of having formed part of the research.

Researchers say that the Hawthorne effect can be mitigated by establishing rapport and building trusting relationships with participants (Oswald et al, 2014), which is what I sought in my interactions. I should emphasize that my goal was not to bring about behavioural or strategic change in the course of my interview, although I do believe that participation could have triggered thought processes subsequent to our conversations. Stemming from that logic, it would concern me that any group excluded from qualitative research may be deprived of its benefits, so whilst I did not wilfully seek to exclude any group, I did choose to incorporate two additional diversity considerations in my research: geography and gender.

**Geographical diversity:** Over the last two decades, I have observed that where in the world the organisation is based or headquartered plays a



major role in its corporate culture and internal dynamics. A respondent's perspective, situatedness in the organisation and remit in the hierarchy are very influenced by the firm's physical location, as well as its underlying economic, social and political environment.

In this regard, Hofstede (1991) distinguishes between 'nation culture' and 'organisation culture' and their interacting influences with cultural dimensions (masculinity-feminism, collectivism-individualism, power distance and uncertainty avoidance) accounting for countries' distinct differences in values (Routamaa, Hautala and Tsutzuki, 2010). Hofstede (1991, pp. 23-158) defines these dimensions as follows:

"Power Distance is the extent to which the less powerful members of institutions and organizations within a country expect and accept that power is distributed unequally. Individualism pertains to societies in which the ties between individuals are loose: everyone is expected to look after himself or herself and his or her immediate family. Collectivism as its opposite, pertains to societies in which people are integrated into strong, cohesive groups from birth, which throughout their lifetimes continue to protect them in exchange for unquestioning loyalty. Uncertainty Avoidance is defined as the extent to which the members of a culture feel threatened by uncertain or unknown situations. This feeling can be expressed through nervous stress and a need for predictability for example, by a need for written and unwritten



rules. Masculinity pertains to societies in which social gender roles are clearly distinct, and Femininity pertains to societies in which social gender roles overlap.”

The following tables reflects are divergent cultural dimensions play out:

<b>Cultural dimensions</b>	<b>Japan</b>	<b>Finland</b>
Power distance	Medium	Small
Masculinity	High	Low
Individualism	Rather collectivist	Individualistic
Uncertainty avoidance	Higher uncertainty avoidance	Lower uncertain avoidance

*Figure 50: Comparison of Hofstede’s Cultural Dimensions in the Case of Japan and Finland.*

Extrapolating this to the organisational sphere, one could conclude that Japanese firms would tend to be more hierarchical (power distance), but more team and group focused (collectivism) in the workplace. I wanted to explore how cultural differences impacted the view of and the role of the people leaders in organisations.

Geographical and cultural differences also generate a diversity of thought. In a 2014 Harvard University study, researchers examined the ethnic identity of the authors of 1.5 million scientific papers written between 1985 and 2008, finding that research studies generated by diverse groups were more widely cited and received higher impact factors than those written by authors from the same ethnic group. They also found that that stronger papers were associated with a greater number of author addresses,



reflecting geographical diversity, as well as a greater number of references, reflecting intellectual diversity (Phillips, 2017).

Similarly, research by Nemeth and Wachtler (1983) on organisational behaviour and group dynamics showed that heterogeneity of group members typically yields better problem solving than does homogeneity of group members (Antonio et al., 2004). According to their study, even in cases where the heterogeneity of the group is the minority, their introduction alone stimulates the majority to find new solutions to the problem which they would not have found by themselves.

My network and community of practice is primarily based in North America and Europe. In my view, the decision to consciously reach out beyond that scope to people of different ethnicities in different geographies contributed to a broad diversity of thought and enriched my research.

**Gender:** I wanted to ensure adequate female representation in my interviewee pool. According to the United States Bureau for Labor Statistics, 58% of L&D managers are women (Oesch, 2018). However, research by Donald Taylor, chairman of the Learning and Performance Institute, on roughly 8,000 L&D professionals found that women hold 67% of support and entry-level positions and men, 33% yet this ratio completely inverts at the senior level, where men hold 69% of leadership positions and women, 31% (Taylor, 2018).



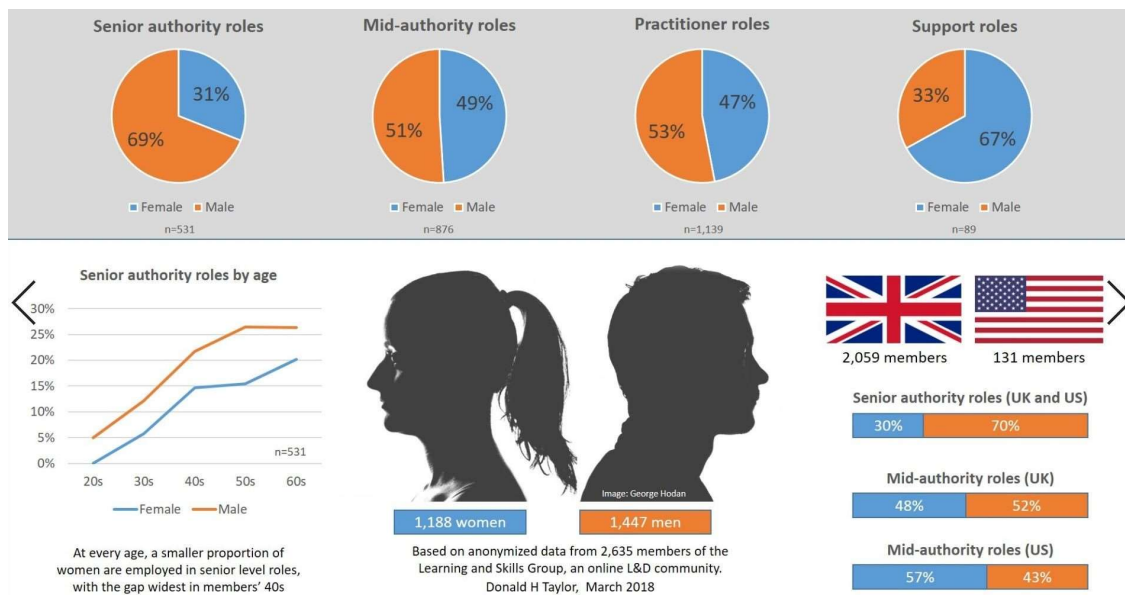


Figure 51: Survey Results - Gender Split in L&D.

I did not want this discrepancy mirrored in my research. Across industries – including the tech sector – numerous studies have highlighted the positive influence of female representation in organisational leadership. Researchers Dezsö and Ross (2012) explored the effect of gender diversity in the top firms in Standard & Poor's Composite 1500 list. Among their conclusions, they found female representation in top management correlated to an average increase of \$42 million in firm value. In the same study, they also measured the firms' 'innovation intensity', finding that companies that prioritised innovation saw greater financial gains when women were part of the top leadership ranks.

In the same vein, a McKinsey study discovered that the probability of outperformance increases proportionally to a firm's diversity rates. As an example, companies whose executive cadres were more than 30% female



tended to outperform those with percentages between 10 and 30. Dixon-Fyle et al. (2020) found similar results, concluding that companies whose executive teams were in the top quartile for gender diversity were 25% more likely to have above-average profitability than those in the bottom quartile.

If there is a direct link between the presence of female and globally diverse leaders on corporate profitability, I wanted to ensure that women leaders and thought leaders had an equal voice and opportunity to share their knowledge and experience – as I have had in this project.

Whilst I am pleased to have achieved this across all roles and geographies, I must emphasise that this was an organic process, as I did not seek to exclude any gender or race, or set a target percentage of how many diverse people to include. My objective was to give an equal voice for L&D leaders with the same professional standing, irrespective of gender or geography.

#### Participant Recruitment

**Using technology:** I work in technology, a profession where knowledge is socially constructed, and engage with a vast global community of L&D professionals, some of whom I have never met in-person. I wanted to recruit participants in a way that was unique to my world.

My first step was to go social and go digital. The core motivation behind the doctorate was to trigger a fundamental change in my profession to any extent, and the only way to achieve this goal was ensuring as many people as possible heard about it, right from the outset. Two years ago, this felt



daunting. Then, my research journey was confined to me and my university. My networks extended to learning leaders in the institutes where I belonged and to professionals whom I followed on social media. I spoke on panels and smaller industry events to share my experience and expertise, but now was approaching as a researcher to pose questions and seek solutions rather than sharing them. I needed a platform where the pivot felt natural and enabled canvassing the widest audience possible. Above all, I realised that reaching an audience in technology would require using technology as my evangelist.

Social media in general and LinkedIn in particular have changed how people interact in the corporate world over the last two decades. At the time of writing, LinkedIn encompasses more than 58 million companies and 810 million users in 200 countries (Newberry and Beveridge, 2022), making it the main corporate social network. Even 20 years since its founding, no new platforms have seriously challenged its market position, and it remains the ultimate tool for anyone looking to make professional connections or find employment (Sundberg, 2022). I have always turned to LinkedIn for thought leadership, to both advertise and seek jobs, and communicate directly with my network, which is why it was the logical choice to seek out my research participants.

The same key LinkedIn statistics report says that LinkedIn posts with images are twice as likely to get interaction – so I went one step further. I



created a film introducing the purpose, aims and objectives of my research and posted it on LinkedIn. - [LinkedIn Film Post](#)

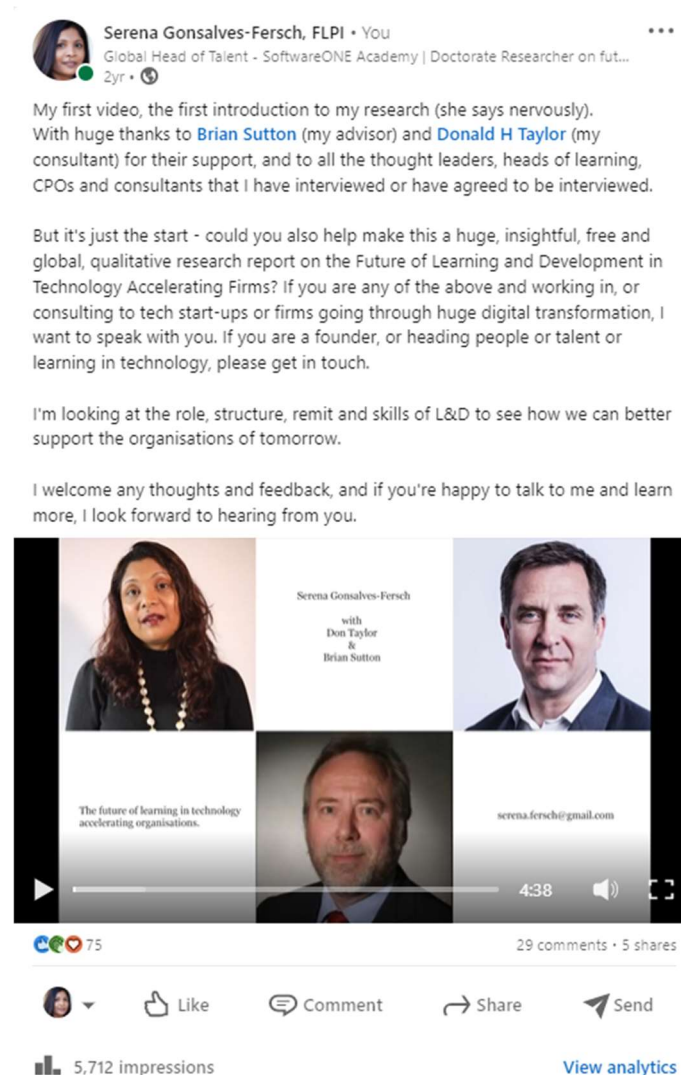


Figure 52: LinkedIn Film for Potential Interviewees.

The film's reception exceeded my expectations, garnering more than 5,000 views. The video not only helped me reach out to my community of practice and network, it also helped raise awareness of the change I hoped to inspire in the L&D field. This post attracted around 30% of my research participants, including the CEOs of many small firms, but more importantly,



it provided me with opportunities and forums to speak about my research, while enhancing my visibility in my community.

At the outset, I was unsure of the extent my university research would be shared without my evangelising. For this reason, how I 'marketed' my change was part of my data gathering strategy, all the way to the socialising of my findings. Early on, I was keen that my engagement with professional forums underscored my ongoing commitment to disseminate and share my emergent understanding with a wider peer network.

This was more than about speaking and sharing: it was also about listening and opening up channels for dialogue. Whilst I have the planned steps within my inquiry, these additional informal discursive opportunities provided a test bed for emerging ideas. Although not officially part of my inquiry, they are valuable insights, observations and reflections, which I draw upon later.

That said, there was one disadvantage of this mass social approach – the 'snowball sampling' effect mentioned earlier. The timeframe between the film's posting and people's response varied, stretching over a few months. By then, the number of interviews had increased manifold. It felt harder to turn down a professional who might be late, but meets your criteria, and is proactive and extremely interested in being a part of your research.



- Direct contacts: These interviewees came through my network built over the last two decades in the learning profession, those I knew and those I knew of. I shared the film and an email request with them. Around 30% of my interviewees came through this route.

---

Dear X,

I hope you are safe and well at these unprecedented times. I was reaching out in the hope that I could please interview you.

Some background - I am a head of Talent and L&D (though not at the moment), a Fellow of the Learning and Performance Institute, and alongside the day job, I have for the last two years been doing a doctorate at Middlesex University on the future of learning in technology accelerating and start-up organisations. Don Taylor is my consultant, one of the LPI's founders, Brian Sutton is my advisor. I'm speaking with CEOs and founders, heads of people/ talent/ learning who have set up People and L&D functions in high growth tech companies, or have seen firms through digital transformation. Or are interested in the landscape of developing their people through hyper growth and tech transformation in firms. And I'm also speaking with thought leaders, consultants, researchers and disruptors to the field.

To these ends, I was hoping I could speak with you please. I would really appreciate learning more about your experience and views on how people development is in high growth and/or new technology firms and what you'd like it to be. Or how you lead learning through a digital transformation agenda. It's all as anonymous as you like and you'll get all the outputs of the study - which we're hoping will be a cross-disciplinary insight. worldwide, qualitative piece of research.

I've made a short film about it - [https://www.linkedin.com/posts/serena-gonsalves-fersch-flpi-a23589\\_my-first-video-the-first-introduction-to-activity-6657967323086897152-ucB4](https://www.linkedin.com/posts/serena-gonsalves-fersch-flpi-a23589_my-first-video-the-first-introduction-to-activity-6657967323086897152-ucB4). If you have some time over the next coming days/ weeks, please can we speak? If you share your email address, I can send you the abstract for the doctorate and any other information.

Thanks very much X. Much appreciated.  
Serena.

---

*Figure 53: Text of Message for Prospective Interviewees.*

- Referrals from other interviewees: This pool comprised the bulk of my interviewees – around 40%. Thought leaders and consultants referred me to CLOs they had worked with, CLOs and CPOs referred me to their CEOs and COOs, and CEOs and COOs referred me to their teams and their advisors. As a researcher, I was encouraged by the appreciation and belief in the need for my research, and the support from my



community of practice to achieve these aims. Thanks to this response, I was able to ask for participants in areas where I had less of a network – like women learning leaders in Africa or organisations in South America. I could also tap into my thesis advisors' network for a broader reach.

This route, however, also significantly contributed to the 'snowball' effect in my sampling. At the end of the interview, my interviewee would introduce me on email to one or more additional participants. Though most of these were relevant, I found considerable commonality in messaging by the end of the interview process.

In whichever manner the interviewees were contacted, they were sent a consent form and participant information sheet ahead of the interview (see Appendix 2).

It is worth mentioning that I did not start my research by first recruiting all participants and then commencing interviews. These processes worked in parallel. On the upside, this meant I was not constrained by finding willing participants before commencing my research. On the downside, it made it difficult to draw a line regarding the saturation point. In the end, I conducted 68 interviews, each between 60 and 90 minutes in duration. This is an important element, because the nature of my sampling the interview pool was constantly in flux and growing.



Whilst I established at the outset the right combination of people with whom to speak, I failed to define a clear number in each category to consider it a complete sample size. Unfortunately, there is sparse literature in qualitative research with benchmarks to establish sample size, or guidance to detect when saturation has been reached i.e. the researcher concludes no further information needs to be gathered (Boddy, 2016).

In a study for the National Centre for Research Methods, 14 expert social scientists and five early career researchers were consulted with the same question – *how many interviews are enough?* – and the answer mostly comes back as ‘it depends’. Harry Wolcott said ‘you keep asking as long as you are getting different answers’. Charles Ragin echoed the saturation argument, saying, ‘once a qualitative researcher is conducting their research, they may find that the evidence is so repetitive that there is no need to continue’. Adler and Adler say 50 for a PhD dissertation, while Julia Brannen and Howard Becker say that one subject may suffice depending on your research purpose. Norman Denzin and Les Back urge qualitative researchers to consider the quality and depth of analysis needed at the selection process, and Jennifer Mason rightly points out that novice researchers might tend to do more rather than less, believing a larger sample size is better. The study ends as it began, with ‘how many?’ and answered with ‘it depends’ (Baker and Edwards, 2018).



I faced the same conundrum and fell into the same trap Mason discusses. Whilst my criteria on roles was clear (seven professional categories), whilst I was clear on the two types of organisations (accelerating and transforming) and whilst it was clear my project would be internationally diverse, how does one divide it? By continent? This was problematic because one wouldn't necessarily put India and China in the same experiential category, for example. Or by country? In this case, my sample size would grow to an even bigger size.

In the end, I opted to start with a proportion rather than a number: 40% people leaders (both HR and L&D), 40% thought leaders and consultants, and 20% business leaders. I made this decision based on my network (I knew more people leaders and consultants than CEOs), the level of interest I was attracting from my social media advertising and direct outreach, as well as the depth of insight I could garner from my conversations.

Some decisions regarding knowing when I had reached saturation came down to what I would describe as 'experience instinct'. I needed to start and stay attuned to guidance from the journey to know when to stop. McLean uses the Greek word *phrónēsis* – practical wisdom or knowledge derived from experience – to define a proper qualitative inquiry as being in-situ by which interviewers leverages their experience, adaptability and attention to detail to guide the interaction (McLean, 2019). Kump speaks to the dilemma researchers face on whether to admit to using instinct or downplaying its role to avoid the risk of lacking scholarly rigor, with the



result of generating less-than-honest research reports (Kump, 2022). I have chosen to do the former and explain my confidence in where and why I chose to use my professional instinct.

In an MIT Sloan study, the author speaks of two quandaries faced by corporate managers: first, 'paralysis by analysis', wherein not enough or too much emphasis is placed on analysis, leading to incorrect or delayed decisions; and second, 'extinction by instinct', wherein again, too much or not enough emphasis is placed on instinct with largely the same consequences (Langley, 1995).

In my view, rationality and efficiency can be an effective mix. I have sound personal analysis to back my choice of participant profile, whereas the decisions regarding the global scope of my interviewee pool, the number of interviews to conduct, and the right stopping point were all made along the journey, when professional my instinct said I had enough.

At the same time, I opted to defer the analysis on which interviews to keep and which to discard, and on what grounds, until after finishing all the interviews. Kump concludes with how researchers tend to report only on 'validated instincts'. I will discuss both the successes and shortcomings of my approach in subsequent sections.

#### [Participant Overview](#)

As seen in the following table, my participant pool was divided by role and by location:



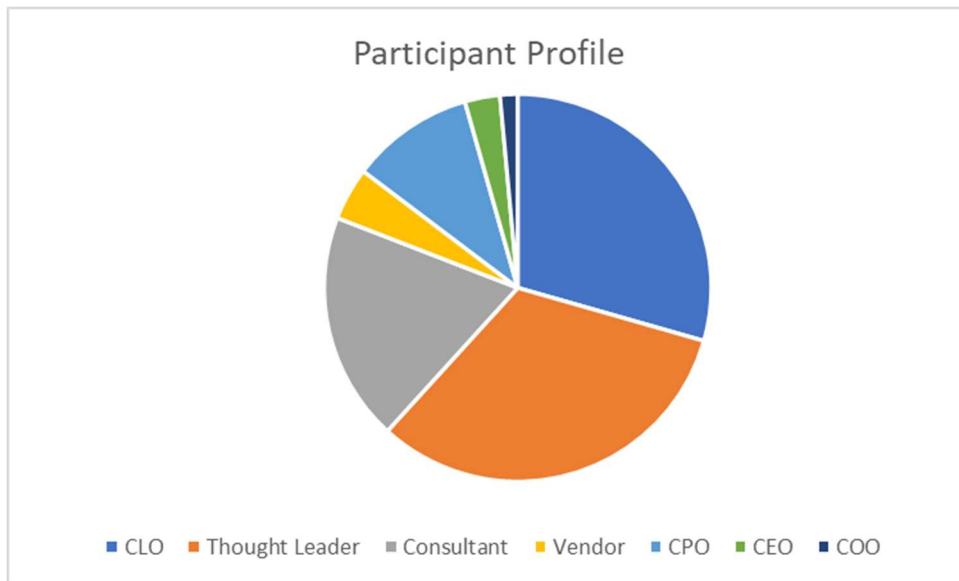


Figure 54: Breakdown of Participant Pool.

On the following chart, the first country represents participants' geographical location and the second geography represents their remit:

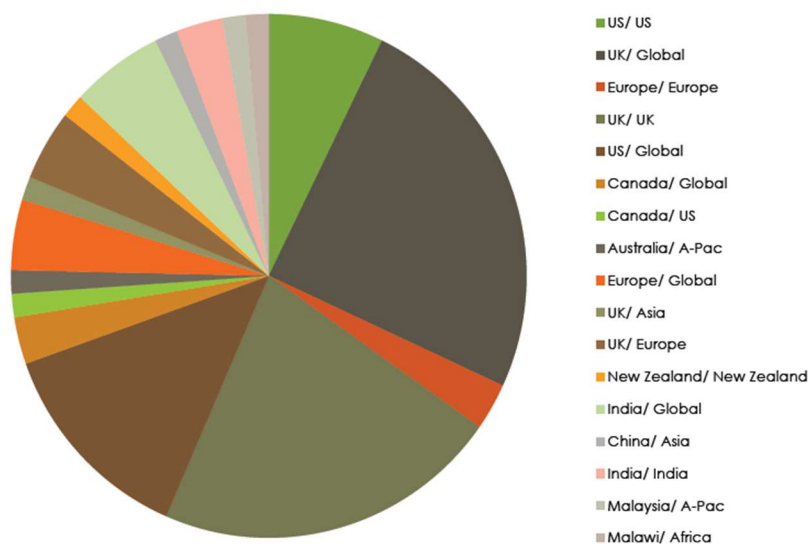


Figure 55: Interviewees' Location and Remit.

On occasion, I realised that participants' job titles didn't reflect the roles they were performing. Start-up firms had HR and operations managers who



covered L&D, recruitment and all areas of chief people roles, although on a smaller, more tactical level. Also, thought leaders authored books, created open-source white papers and video content, and freely shared knowledge at seminars and conferences, while also holding consultancy and advisory roles, and even CLO roles in some cases. In consequence, I introduced primary and secondary classifications to my participant listing to better reflect interviewees' true roles, beyond their job titles. Since some job titles are unique and my research is public, I chose to remove the titles. The complete coded list of interviewees is available in Appendix 3.

In terms of how and why data was classified in this manner, I centred on two core elements: anonymity and confidentiality. Saunders et al. distinguish anonymity as a form of confidentiality wherein participants' identity is kept secret. In their words, 'confidentiality also includes keeping private what is said by the participants, something only achievable through researchers choosing not to share parts of the data' (Saunders, Kitzinger and Kitzinger, 2015).

For me, anonymity was key to encourage participants to freely share their views and experiences. This included altering the names of the organisations they worked with in the transcript and excluding it from the findings. The confidentiality extended to the analysis of the transcripts. In one case, for instance, a participant shared a client story and later requested that I delete it from the research. Another willingly shared a



story for me to include the case learnings but asked to disguise certain details as they were under a non-disclosure agreement (NDA).

This generated a certain dilemma in my role – as purely a researcher, in which case I protect the identity of my interviewees at the risk of not reporting elements and thereby seeming to exhibit less research-rigour, or as a ‘transformative activist’ seeking bring about change in my field and therefore paying less heed to confidentiality in favour of reporting the facts. As Beaz observes, confidentiality is a convention in qualitative research since it advances the moral and political imperatives of secrecy, which in turn can hinder transformative political action (Baez, 2002). I chose to address this dilemma in the coding, allowing for the readers to embrace the changes whilst firmly protecting the sources of the evidence.

I created the coding and classification only after completing the entire interviewing process to ensure the utmost confidentiality regarding participants’ names, job titles and organisations. The following table explains the logic behind the alpha-numeric value assigned to participants:

Coding Key		Definition
L	Learning/CLO	All heads of L&D in organisations regardless of specific job title or place in the hierarchy
T	Thought Leader	Those who authored books in the L&D field, research and contribute to the theory and practice of corporate learning
C	Consultant	Those who consult with L&D and people leaders, and have held senior L&D positions and engage with firms on a temporary advisory basis
V	Vendor	Those providing services into the learning function – usually courses, workshops, facilitated sessions, advise on specific areas of L&D like technology
E	CEO	All heads of start-ups or scale-ups regardless of specific job title, often founders or brought in by the founder or board
O	COO	From start-ups where the head of operations wore multiple hats, including workforce planning, resource management, HR and recruitment
P	CPO	Head of People – HR, Recruitment, L&D and other employee sub-functions sit under them

Figure 56: Coding Key for Interviewees.



### Step 3: Conducting the Interviews – Early Themes

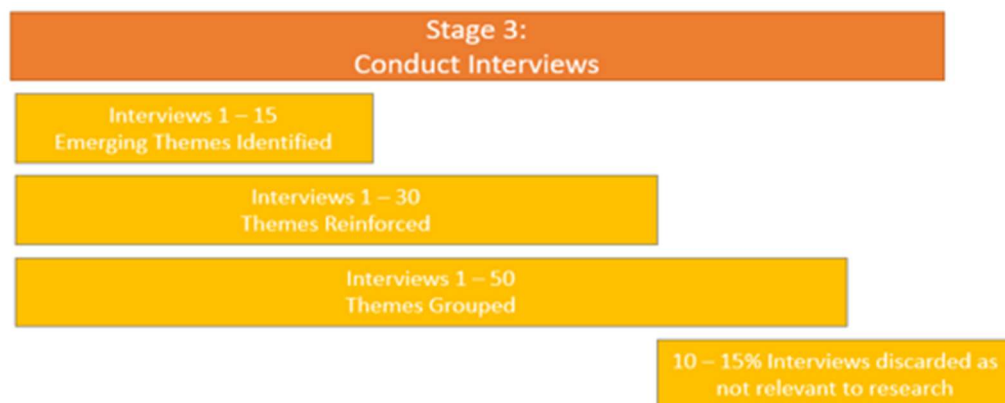


Figure 57: Interviews and Themes.

My interviews were all conducted virtually on Zoom. In the early days of the pandemic, everyone in my target population was working from home. The global impact meant that irrespective of country, offices were shut, and remote working became the norm. This continued throughout 2020, and hybrid working is set to become the norm for work in the future.

According to a 2021 Gallup study, 49% of respondents say that losing the option of remote working at their organisation would increase their likelihood of seeking employment elsewhere (Saad and Wigert, 2021). Had I conducted the interview process before the pandemic, my first instinct would have been to attempt as many face-to-face interviews as possible, at least in my city of residence or frequent business destinations. In my opinion, interaction and connection were enhanced in face-to-face settings, enabling my interviewees to be more open and engaged. I thought emotion, tone and body language would be harder to gauge online.

Ahead of Covid-19, research supported this notion. Within qualitative research, in-person interviews were considered the highest standard of



interviewer-participant interactions (Krouwel, Jolly and Greenfield, 2019) and viewed as marginally better than online interviews. Another study with Amazon customers cited at the interviewer's absence in the room to provide focus and direction, with the length and amount of detail more dependent on informants and their degree of commitment than the project topic' (Curasi, 2001).

My participants were carefully selected for their interest in the research and their role in the profession or organisation, so this was definitely not the case in my case. What started out as a non-negotiable route turned out to be very advantageous, and if I to make the choice again, I would conduct interviews virtually for several critical reasons:

- I could easily secure permission for and record the conversation and give my full attention to the interviewee rather than being concerned with taking copious notes. It also meant that I could revisit the conversation as often as I wanted in complete form using both the captured audio and video content, which facilitated the transcription process.
- It saved me time and money. Since I did not have to commute to conduct interviews, I was able to conduct up to four interviews a day, and then spend the next few days to transcribe and reflect on their main messages. If I needed further clarification on any point, I could follow up via email, and add easily add the response into the transcript.



- It gave me flexibility and allowed me to take my project to a global stage. I could speak to leaders in China at 6 am UK time, and in Dallas at 11 pm UK time. This process could have been done by combining virtual and face-to-face interviews but limiting interviews to an online platform ensured a uniformity of experience, no matter where in the world the participants were.
- It allowed for easy sharing of documents and other information. When interviewee T28 wanted to share a new model they had created, they shared their screen and discussed its content. Since the interaction was being recorded, I could return to review the document. The chat function also allowed them to send me the information directly on Zoom as an attachment.

I have since looked up how qualitative research – and specifically semi-structured interviews – were conducted during the pandemic. In one study on the situation of Houston’s homeless community during the pandemic (Roberts et al., 2021), the authors used Salmon’s Qualitative eLearning Research (Salmon, 2016) to ensure they followed the rigour and protocols of qualitative research despite having to employ a virtual platform (Roberts, Pavlakis and Richards, 2021). I followed their example to validate my position:



<b>Category</b>	<b>Description</b>	<b><i>In This Paper</i></b>
Aligning Purpose and Design	Appropriateness and alignment of the study's theories, epistemologies, methodologies and methods.	<i>Irrespective of the virtual interview, my research has been qualitative, the knowledge gained from lived experiences gathered in a semi-structured interview format.</i>
Taking a Position as a Researcher	Insider or outsider positionality of the researcher and the implications of that positionality for conflicts of interest or bias.	<i>As an interviewer and a researcher, I am aware that my position is not positivist. I am part of the profession, and regardless of the communication channel – whether a Zoom call or a face-to-face conversation – I need to be conscious of not steering or influencing the direction of the conversation.</i>
Selecting Extant, Elicited, or Enacted Methods	Appropriateness and fit of selected methods with the study's purpose, research problem and population, as well as the functions and limitations of the chosen ICT (information and communications technologies).	<i>My research is based on the theory that knowledge in my profession is socially constructed. Irrespective of the channel used for the interview sample, an in-depth conversation was needed.</i>
Selecting ICT and Milieu	Rationale for the choice of ICT including the type of data collected (text-based, audio and/or visual) and/or the choice of online milieu.	<i>Four forms of ICT were finally used – the film describing the research and requesting participation, LinkedIn – the social media on which it was deployed, and emails to further establish contact and schedule times. Zoom, an online</i>



		<i>meeting tool available freely, was used for the interviews.</i>
Handling Sampling and Recruiting	Considerations regarding sampling approaches, online recruitment, choice of online data sets, online user-generated content, etc.	<i>This process was formulated ahead of the pandemic: who I would speak with, what I would ask them, and what I would need from them. Recruitment rationale has been explained independently of the use of online interview tools.</i>
Addressing Ethical Issues	Considerations regarding informed consent, protection of human participants, and permission to access and use online data for research purposes.	<i>Ethical considerations have been documented. Participants consented to being interviewed online and recorded. Transcripts were then shared with the interviewees and anonymity was ensured in the final research output.</i>
Collecting the Data	Guide or plan for collecting data via online methods, including familiarity with technology and/or online environment.	<i>Zoom has been used as an online meeting and training tool by corporates, including those I have worked with.</i>
Analysing the Data and Reporting	Plan for data analysis (including preparation, organization and coding) and permissions to use excerpts or quotes in research publications.	<i>Included in this research were 68 interviewed transcribed, reviewed for validity, narrowed down and analysed. Quotes made non-attributable.</i>

Figure 58: Salmon eResearch Model - Mapped.

#### Interviews and Data Collection:

My first five interviews were conducted with two thought leaders and three heads of L&D from my network. As a novel researcher, I made this decision



consciously in order to practice and refine my techniques with participants who would be sympathetic to my 'amateur' status, and more importantly, people whom I could contact again in the case of any oversights or need for further clarification.

My familiarity with the participants allowed me to enhance my interviewing techniques and acclimate myself to this new framework of communication. Whilst participants often shared a similar professional experience as my own, their knowledge, perspective, expertise and lived experiences were important to my research outcomes and needed to be investigated as far as possible without my personal bias or input (internally, I recognise that I continue to be part of the context).

I would refer to the first group of people I spoke with as 'informant-friendships', as described by researcher Jodie Taylor. In her work, she acknowledges degrees of friendship according to varying levels of familiarity, rapport, respect and emotional attachment, and their inevitability for professionals working in the same field given the likelihood of pre-established friendships and the probability that these relationships will influence the researcher's work and industry positioning (Taylor, 2011). For me, the relationship was about my comfort as a researcher with those who were comfortable with me.

On replaying the recordings, I encountered instances wherein interviewees shared more than they intended for me to publish, such as unintentional mentions of client names or project descriptions providing too much detail.



In these cases, I ensured transcripts were submitted first to these participants and appropriately anonymised. At the end of these initial interviews, I was comfortable enough to request feedback and refine my style – mainly around getting better at asking open questions – based on their input.

*Interviews 1-15: themes begin to emerge*

Asking open-ended questions became harder as I progressed and themes started to emerge. By the 15<sup>th</sup> interview, I noted the repetition of some key words, which participants flagged as issues for L&D to address, pain points they experienced, or areas where they saw change coming in organisations, people or learning functions. In these instances, I began making simple notes whenever the key phrases were mentioned and put a form of 'tally mark' scale if they were repeated often. I did this manually and did not attribute it to any speaker. Neither the questions nor the direction of enquiry were altered based on these themes. On replaying the first 15 interviews, I sense an internal conflict to avoid agreeing, disagreeing, or mentioning that I had heard the themes before.



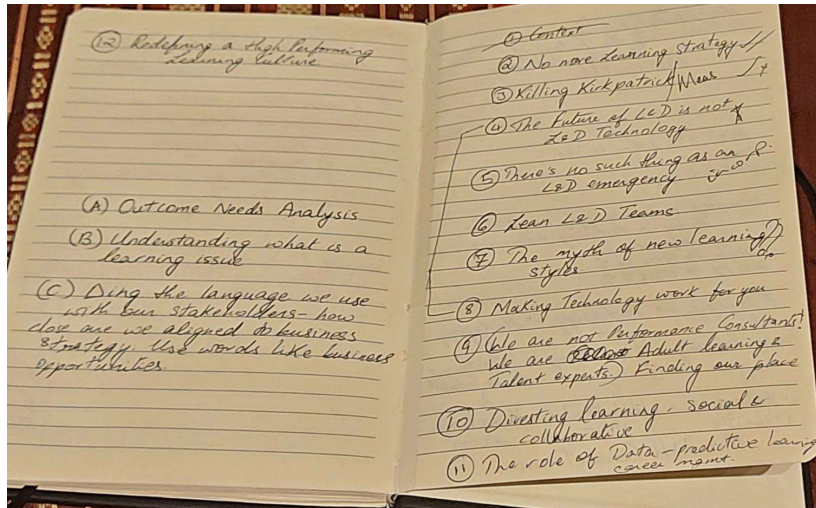


Figure 59: Early notes with emergent themes.

I also used my notetaking for quotes. Often participants used terms that I wanted to ensure were captured, such as metaphors and analogies I had not considered in the context of our profession. Even though participants knew they were being recorded, I often noticed their visible excitement and a change in body language when I made the quoted notes.

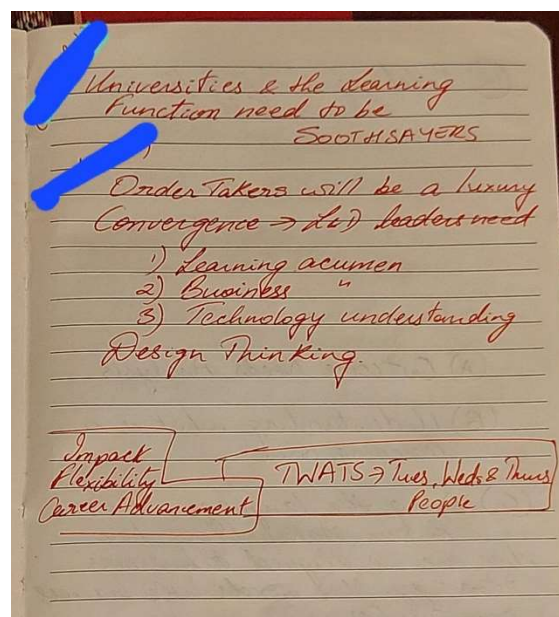


Figure 60: Notes for quotes.



Most of what I did in this phase was manual – the replaying of the recordings to transcribe, the collecting of the initial themes, and my written notes regarding areas for further reading and research. No grouping or coding was done at this stage of the process. I did not start coding and analysis until all 68 interviews were completed.

Nonetheless, this would be the phase where in many ways, I felt validated in the reason for starting the doctorate. I started the research based on my firm belief that the L&D profession needed to change, although I didn't necessarily know the solution or the direction. Even at this early stage, the emergent themes, even though they were raw, all represented areas for L&D to change. They varied from how learning should be delivered in the firm and approaches for measuring effectiveness to the role of technology.

According to the literature, researchers must avoid the temptation of forcing preestablished distinctions in the data and ensure that emergent themes are grounded both empirically in the data and analytically in the context (Williams, 2008). I believe this was achieved by doing no more than documenting these themes. Whilst I did not analyse, categorise or engage in depth with the data at this stage, the emergence of themes definitely energised me to continue and inspired me to talk with more people. At the same time, it contributed to the 'just one more' thinking and the snowballing of the sampling process as detailed earlier.



*Interviews 16-30: themes reinforced*

My confidence as a researcher began to grow and the interviewing process became a flow. This process went on for approximately four months, during which I conducted several interviews a week. After overcoming my initial lack of confidence as an interviewer, I was able to focus on the participants and observe not just 'what' they were saying, but 'how' they were narrating it.

At first, it was easier to focus on the areas we needed to cover whilst I found my footing as a researcher. Participants were in decreasing order of familiarity, but the relationship was comfortable enough that conversations began to flow from the moment they were asked to introduce themselves to the camera and confirm they were happy to be recorded. I could go back and clarify my understanding, and even ask what they thought of the experience.

I am not sure what was infectious and influencing the other – whether it was my confidence and interest and passion in my field, or the passion and eagerness to share that I saw in my participants. For the most part, there was a sense that the experts and my colleagues were pleased to be included in the research, eager to share their views, and keen to be represented as part of an industry collective.

*Interviews 1-68: themes grouped*

After close to 40 interviews, the themes got increasingly repetitive and obvious, even without the formal start of the playback and analysis process. I had listened, remembered themes and jotted them down. My initial



inductive coding approach, defined by Bingham and Witkowsky (2022) as an emergent strategy wherein the researcher reads and gathers the data and allows codes to emerge, eventually progressed to deductive approach, wherein the new data started to reaffirm the codes already established. I embarked on the interviews without preconceived notions of what the codes should be and the determination to allow the narrative to determine the themes, to a place where I was simultaneously seeking new themes while inadvertently applying predetermined codes to the data (Bingham and Witowsky, 2022).

This might seem unusual in many ways, yet I deemed it an extension of the bricolage nature of my research, starting from generating themes via inductive coding and open coding processes in a 'bottom-up' analytic strategy, to drawing elements from deductive coding wherein data could be harkened back to themes essential in the L&D theoretical framework, such as learning analytics or instructional design frameworks.

At this point, I was starting to feel the effects of fatigue. Several studies analyse the concept of research fatigue, wherein an individual or population of interest tires of engaging with research and consequently avoids further participation (Patel et al., 2020). Way (2013) highlights its prevalence in small communities, particularly when they do not see tangible results from research activities.

In my case, it wasn't so much research fatigue as personal fatigue. At this stage of the interviewing process, my ability to find participants was not an issue thanks to my evangelising and the power of word-of-mouth, but



personal fatigue began to set in. I found myself on a hamster wheel of enjoying what I did and deciding to add one more conversation, only to realise during the conversation that I was coming back to the same key messaging and feeling exhausted at the thought of transcribing another interview.

There were several moments where I began to recognise the mountain in front of me in terms of transcription and analysis. However, I still didn't feel I had enough. It felt like there were still gaps and that I wasn't quite done. The solution was to be more selective of participants, reaching out to only those who I felt were under-represented in my research. In this regard, I had two main criteria: interviewing CEO-level participants, and professionals in China and Africa.

In these conversations, I looked for even more unique experiences from diverse contexts and geographical regions, which energised the interview process yet surprisingly, did not substantially enrich my core emerging themes. At a point, I became perhaps too comfortable in the interviewing process: I genuinely enjoyed learning and interacting with my community of practice and felt a deep sense of belonging despite being unemployed. In this sense, I imagine that my decision to conduct 68 interviews could have been a means to avoid moving out of my comfort zone to the next task, which I perceived as daunting.

I have no reason or pivotal moment for deciding that I was done. I created the pie charts in the previous figures, and realised they represented the right spread, or close enough. I knew I had a good gender, role and



geographical mix, and by the final interview, when no new themes or ideas were emerging, I realised that one new interview meant one more transcript to transcribe.

At this stage, interviewees from the earlier stages came back to inquire how the research was progressing or to ask if I had any preliminary findings to share. I was invited to speak with three interviewees' L&D teams on the objectives of my research and what I was learning this far. All I had as the foundations of this content was my notebook.

I refer again Kump's research regarding the role of intuition, defined as the 'direct knowing without any use of conscious reasoning' (Sinclair, 2010: 378) in the conducting of research (Kump, 2022). Through a combination of instinct, researcher fatigue and knowledge that I had enough representation – I just knew.

#### [Navigating the Interview Process](#)

Interviews lasted between 40 and 90 minutes, with the average across the set of an hour. Sometimes, interviews were split into two parts because a participant ran out of time. In several interviews, it felt as though a palpable buzz was in the air, where understanding was being co-created in real time, with flashes of inspiration on both sides.

In others, they were relatively bland communications of ideas already well formulated in the minds of participants. For example, one person came with preconceived notions on the value of qualitative research; another came



with the intention of finding out what I had learned this far rather than adding their own thoughts.

I remember the turmoil ahead of my first interview with a C-suite leader and my sense of 'impostor syndrome', a common term in both corporate and academic parlance to describe a persistent internalised fear of intellectual disingenuousness. The fact that it tends to be particularly prevalent and intense amongst samples of high-achieving women (Clance and Imes, 1978) made sense to me at this stage. The fear of being 'found out' as a 'fraud' – as neither a true researcher nor a 'senior-enough leader' – caused self-doubt, which in turn manifested as nervousness in tone (Wilkinson, 2020) and a clear difference in the way I started these interviews.

I addressed my apprehension by interspersing interviews with C-suite and non-HR leaders with others with whom I had a greater comfort level. In their 2010 study on doctorate students suffering from this syndrome, Cope-Watson and Betts study (2010) note that affected researchers could alleviate their fear by relying on peers who could provide greater support and a sense of community. This insight was hugely helpful to me.

Peers, professors and often the participants themselves were encouraging, and once I had settled into the conversation, I too noticed a change in my tone and body language. My confidence grew with every progressing interview because, above everything else, I came to realise that I enjoyed this. I was learning from every conversation, although I would not be able to pinpoint my key learnings until subsequent reflection and analysis.



I also enjoyed the interviewing process because it kept me in touch with my field. For the first time in 20 years, I was unemployed. Arguably, until the pandemic, no single event had triggered such a monumental, overnight change in the world of L&D, with the widespread cancellation of courses, materials moved online, learning professionals put on furlough, and recruitment frozen until businesses recovered. But I was home – and if not for my research and conversations, I would have felt very disconnected from my field. This realisation helped build up my confidence while also contributing to the spiralling number of interviews.

As time went on, I got better at navigating the interview processes and detecting spot door-opening triggers and cues for further exploration. Most often these signals were expressions of frustration with a specific aspect of L&D, or areas of the field in which the participant was particularly interested. For example, participant T72 has a special interest and expertise in learning analytics, and became very animated with questions regarding how L&D leaders defined these or used them to measure efficiency of training.

There were also displays of anger, frustration and some choice words. In the case of L76, the trigger point concerned the business perception of L&D. They had worked with a founder-led start-up who espoused strong although misguided ideas regarding L&D's function and scope of services. I clearly recall the participant's range of emotions when describing how they established themselves as the expert, chipped away at prejudice and perception, and what they created at the end. Even in playback, it is



fascinating to relive these experiences with the participants and sense their passion for their role and profession.

According to Ritchie and Lewis (2003), the qualitative interviewer possesses five core abilities: a clear and logical mind; the ability to listen; a good memory; curiosity, and the capacity to emphasise and establish a good rapport. I found myself drawing upon each of these characteristics as my interview process progressed yet found my ability to probe and engage with the participant was greater in proportion with the interviewee's enthusiasm and engagement.

Around the 30<sup>th</sup> interview mark, I also found it more difficult to stay engaged if interviewees treated the conversation as transactional by not proffering more than was asked or sharing more of their lived experience or personal learnings. In one instance, a thought leader refused to discuss certain topics – not because they lacked the responses or the expertise, but because they had already adequately addressed these themes in their book. In this case, I was advised to purchase the book if I wanted to know more. I spoke with another leader who was keener on learning what other interviewees had said than sharing their own perspectives.

This does not mean that I did not conduct a full interview or receive valuable insights from it. On replaying the recording, I notice a dip in my own engagement level and enthusiasm – but this is a personal learning and reflection. I do not believe participants had a different experience as a result, as evidenced by both the duration and content of these recordings.



I began my transcription after my 68<sup>th</sup> interview. I briefly explored but quickly discarded transcription software, which I found more frustrating than helpful. Automation doesn't take into account accents, capture colloquialisms and or serve as a substitute for memory, especially when the connection was poor or there was background noise. In his work, Jenks (2011) speaks of the fundamental questions a researcher must deal with before launching into transcribing, such as defining the appropriate level of granularity, representation of nonstandard speech and protection of participants' privacy. For these reasons, and the need to control and deepen familiarity with the data, I chose to manually transcribe my interviews.

Another conscious choice was to purely transcribe the audio recording and view the video later. Whilst planning my transcription, I understood it would take me roughly an hour to transcribe every 15 minutes of interview talk (Roulston, 2017) and when I started, I realised that this was true. My inability to touch type prevented me from attaining any the proper momentum. I felt as though the audio and video pulled me in different directions and undermined my capacity to focus on the task at hand, which was to get words to paper.

Since my methodology incorporated principles of conversation, I considered using CA's transcription conventions to capture silences, restarts, overlapping talk and other paralinguistic features of talk (Liddicoat, 2007), perhaps the Jefferson transcription system (2004) to capture both *how* and *what* was said. However, I already knew that I would not be using all the



transcripts given the number I had, and the memory that not all were useful – I needed a way to be sure, and this was only possible through manual transcription. Even if memory or distinct dictated otherwise, I also wanted to transcribe every interview to properly recognise participants' time and acknowledge their contribution by sending them all the transcripts.

This process also helped me to compartmentalise and understand how I learn. I needed to approach each task semi-sequentially as I did before. First, find interviewees, engage in conversations and give them my full attention. Then transcribe what was said, and once I start to analyse and find and verify codes, go back to the video recording and look for non-verbal cues like body language and tone.

I had to approach the transcription task – for me, the most daunting and least interesting – with single-minded rigour to ensure it was thoroughly completed. This phase, and 68 interviews, took a long time. By now, I was working in a new full-time role, creating a new function in a new organisation. The task felt tedious and repetitive, more so because I forced my mind to be clinical about it.

I didn't make notes on codes or themes, nor use the transcription process to verify the ideas or topics jotted down during the interviews: I just listened and typed. Specific references to clients and projects were anonymised as requested by the participants. After completing a transcription, I sent it to the interviewee for their perusal and to ensure I had correctly captured their insights.



Following is an example of this interaction. For a sample excerpt of a transcript, please see Appendix 4.

Hope all continues to be well with you. As promised, here's the transcript from our conversation, and I have pasted the questions below. If anything jumps out at you, or you'd like to add anything, please let me know.

Thank you also for the recommendations - [redacted] was fantastic to speak with, and I have [redacted] scheduled for next week. [redacted] didn't respond to my LinkedIn connect requests. If you know them, please could you introduce me to them?

You also mentioned some people in India and the Head of L&D for a bank in Pakistan. Any names I could reach out to please?

If the offer for your red book still stands, my address [redacted] Very happy to do a transfer on PayPal for it.

Thank you again for your time and engagement and all the support. I've sanitised the transcript, but do let me know if I've overlooked anything.

Look forward to catching up soon. [redacted]

Serena

- Articulate the trends you are seeing in the L&D landscape
- How are the CLOs you work with changing
- Is there anything different you have observed about L&D in newer organisations?
- What are firms doing different now in their approach to L&D?
- Describe your view of the L&D professionals 'market' at the moment? The skills and experience they come with
- How is technology impacting people development decisions?

Geography Specific Questions

- How would you describe the learning landscape in your region?
- What's the typical structure of learning functions in smaller technology firms there?
- How is the learning function viewed by organisations?

Figure 61 Transcript Submission Correspondence

After transcribing all interviews, I had to decide how to analyse this vast amount of data. As a place to start, I selected 10 interviews spread across categories and combining those with people with whom I had a previous rapport and others recalled as particularly insightful. I choose interviews that stood out as enjoyable and recordings that I continued to revisit. At this point, because I had only transcribed the audio, the focus was on content rather than delivery or non-verbal cues.

Whether it was the interviewee's personality, the subject matter or something else, these were energising and compelling conversations, the first to incite another listen. My first 10 conversations for analysis looked like this:

Primary Category	Secondary Category	Location/Remit	Code
CPO	CPO	UK / Global	P20



CLO	CLO	UK / Global	<b>L25</b>
Thought Leader	Consultant	UK / Global	<b>T62</b>
Thought Leader	Consultant	Europe / Global	<b>T12</b>
CLO	CLO	Europe / Europe	<b>L76</b>
Thought Leader	Consultant	US / Global	<b>T22</b>
CLO	CLO	US / Global	<b>L45</b>
CLO	Thought Leader	US / Global	<b>L23</b>
Thought Leader	Consultant	US / Global	<b>T30</b>
CLO	CLO	UK / UK	<b>L43</b>

*Figure 62 First Transcripts Revisited*

I proceeded in similar fashion with the next 10 and so on. At this stage, my aims were to focus on the conversation, clean up the transcripts ahead of analysis and highlight any quotes I wanted to revisit during and after the coding stages. After reviewing software programs like Nvivo and available tools to help filter and manage qualitative data, I decided to continue to work manually. Although they could help identify patterns and themes and offer insights regarding which transcripts to include or exclude from my analysis, they took time to set up and left me feeling disconnected from the conversations and my main takeaways. By reviewing each transcript and making notes, I was able to circle back on their relevance to my research question and deepen my focus. This approach also allowed for me to take note of emergent high-level themes and topics.



Dovetailing with my demanding full-time job, the transcription process took me nearly two years to complete, including making note of compelling quotes for future use and margin notes of broad recurring ideas before revisiting to code.

#### *Discarding 10-15% of Interviews*

At this stage, I also decided which interviews I would discard based on the rationale described in the Methodology chapter. After 68 interviews, I relied on the memory and 'feeling' derived from my conversations. I re-read all the transcripts and separated those deemed apt for coding. After much deliberation, I decided to discard interviews by asking myself the following questions:

- Were they sufficiently anonymised? Would someone who had genuinely and unselfishly given up their time feel that their views were not part of the final thesis?
- Was I 100% sure the views expressed would not contribute to the ultimate findings?
- For those I discarded on ethical grounds, was this the right decision? Should I allow someone's manner or approach influence my decision to include their views if relevant to my research question?
- Was I certain that these were not discarded as a result of 'analysis fatigue'?



Ironically, these questions made me re-read these interviews a few more times to make sure my reasons for not coding them were sound. Whilst I still highlighted quotes in a couple of transcripts, overall, I knew that I could objectively justify their exclusion.

I explore my own reflexivity in later chapters since, as Dodgson (2019) observed, I recognise the role of the researcher in shaping his or her findings, the absence of objectivity and participants' lack of control over the final conclusions. This made me wrestle with my choices, yet I finally abandoned the internal monologue due to both the sheer volume of data left to be coded and my conviction of having done sufficient due diligence to justify my choices.

#### [Step 4: Focussed Coding and Categorisation](#)

When I finally began the coding process, I was satisfied with my decision to carry it out manually without the use of software and tools, and that the ideas and thoughts flagged and noted still didn't constitute robust themes. By this stage, I thought my coding would be a bit deductive: I had read and re-read over 50 interviews, cleaned them up, highlighted quotes and determined which ones I would use – but I was dissatisfied with the rigour. Certain issues which I took as common knowledge in my profession were not reflected by some of the interview groups. For example, the notion that organisations would define human resources and compliance before introducing the L&D function seemed commonplace to me, until discovering anomalies in some of the interviews. Had I discarded this part of the



interview, I would not have been able to accurately compare the places this did not happen and why.

For this reason, I decided to strip it all back and go back to the theory of coding and build up from there. Since I was using a broad qualitative approach of semi-structured interviews that allowed for open-ended responses, I knew I was using inductive coding of my data set.

Although I had definitively discarded grounded theory as my methodology, I still found useful detailed guidance from its creators Strauss and Corbin (1990) on the process of creating codes, categories, and themes in qualitative research analysis. Open coding allowed for the perceptions of participants to emerge in the specific context of my research focus, whilst giving me a deeper understanding of the participants' responses regarding their lived experience.

I vacillated on whether salient insights from my interviews constituted themes or categories, and whether it was possible to do any sort of a priori/deductive coding. The authors acknowledge the temptation of trying to fit the data into preconceived ideas or theories rather than letting it guide the analysis. This promoted my decision to go through the process of open coding for the first ten interviews.

Straus and Corbin define coding as 'the process of identifying and labelling discrete pieces of data that represent some aspect of the phenomenon under study' (Strauss & Corbin, 1990, p. 61). I started out by formatting my document and numbering each line, and when the entire document was done, I sought codes line by line and made comments in the margins. In



some cases, the same line yielded multiple codes, and a simple note alongside the line allowed for me to track:

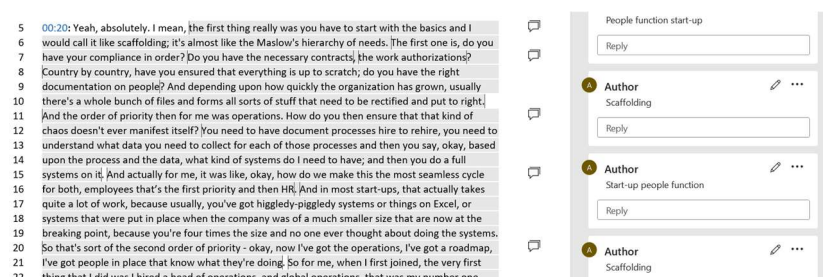


Figure 63 Line numbers: Transcripts and Codes in Comments.

After completing a document, I extracted the codes onto a Word Document. The original plan was to associate the interview questions to guide the development of the codes, meaning structural coding. However, because of the different groups of participants and the semi-structured nature of the conversations, this was not always straightforward. In the end, I saw no benefit of using Word and moved to Excel.

Page	Line	Comment scope	Codes
10	12	So the learning organisations really need to understand how to leverage technology to get performance support or training, whatever it is to the workforce, as quickly as they can.	Speed of content delivery
10	12	So the learning organisations really need to understand how to leverage technology to get performance support or training, whatever it is to the workforce, as quickly as they can.	Technology experts
10	12	So the learning organisations really need to understand how to leverage technology to get performance support or training, whatever it is to the workforce, as quickly as they can.	DT tools
10	14	And so in part of the challenge is at scale. So an example for me, maybe at Home Depot, we knew that we were hiring a workforce that probably the majority had never owned a home, will never own a home, did not have deep expertise in home improvement, but they were standing in the aisles of those stores ready to serve customers who if you're going to talk to someone in one of those stores, you have a	DT tools

Figure 64 Extracted Codes in Word

I continued the process in Excel, using the 'filter' function to group codes from multiple interviewees so I could extract patterns and categories eventually:



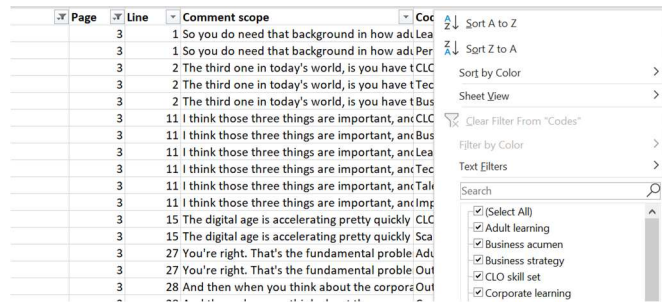


Figure 65 Filtered Codes in Excel

The Excel document listed all codes per interview, enabling me to sort and filter the codes across all interviews, cluster or categorise them (axial coding) and eventually identify themes as I reduced and refined them into categories. Several codes that emerged came from participants' own words, meaning direct quotes were used as codes. This allows codes stay as close as possible to the participants' actual spoken words (Manning, 2017) or original phrases.

It took me several weeks of procrastination and nerves before starting the coding process. Despite the extensive literature on the subject, the task felt daunting, and I didn't know where to start. As Elliott (2018) describes, the coding process is one that novel researchers must undergo, often with limited guidance. I called it 'analysis paralysis', defined by the Oxford dictionary as the 'inability to respond effectively to a situation due to an over-analytical approach or to an excess of available information'.

I stared at my first transcripts, repeatedly formatting the font, and numbering the lines without attempting a single code because I doubted if I truly understood the word 'code'. I am unable to ascribe a single event that prompted me to begin other than the realisation that the only pathway



to deriving meaning from my data necessitated the coding process: there was no other way around it.

The first transcript was coded almost mechanically by bringing together words that seemed to describe what was being said in a particular line, and often multiple phrases discovered in a single line or sentence. My first attempt yielded over 200 codes in a single interview. Elliott (2018) quotes several researchers to show that the number can be quite arbitrary, from the 20 codes suggested by Creswell to Friese's recommendation of between 50 to 300.

Nevertheless, this was quite worrying given the sheer number of interviews that required coding, which could feasibly lead to more than 8000 codes. With this in mind, I used my first interview as a starting point, ensuring subsequent codes followed the same nomenclature and only creating new codes where necessary. Sometimes, it was fairly obvious where categories were starting to form and where a set of codes formed part of a larger sub-group, as illustrated in Figure 66.

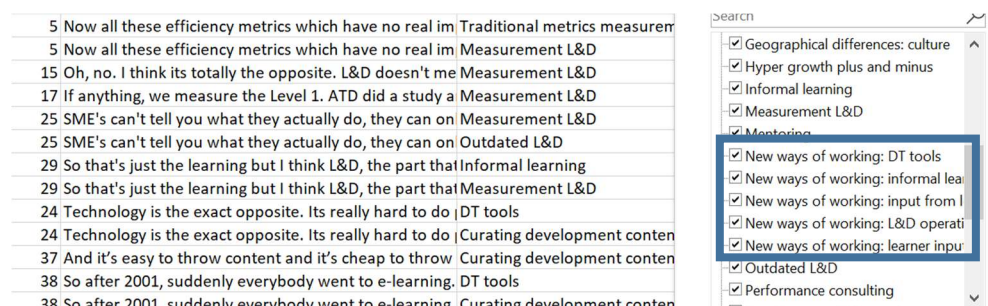


Figure 66 Codes to Categories

With every following document, the number of new codes moderated, and patterns seemed to emerge from the data. I still hadn't started to move them into categories, but at the end of the coding exercise, I had



approximately 3700 sentences and phrases coded, and a total of 215 unique codes.

### Emerging Themes

I played with several formats to extract the themes from the categories. It wasn't only about what was being said; often, the same topic was viewed from two different angles depending on the participant's role and profile. In this regard, a category like L&D Operating Model had different meanings, relevance, and context for thought leaders versus CLOs versus HR directors. Also worth noting is the situation that sparked these divergent views, since by and large they followed from a discussion point or question on organisational priorities.

It was hugely enlightening to see the different views and priority levels given to the L&D operating model by each group of interviewees. Having organisational priorities as a theme was not enough: it was critical to include which interviewee group was speaking about it and how.

This pattern repeated itself across other codes. For example, in the following table on the topic of L&D and business value, I highlight two quotes on the differences in how a thought leader and chief people officer perceives and believes L&D provides value. Both refer to accountability and data – both have a different perspective, but on the same theme.



<b>Thought Leader</b>	I think there's, there's a much greater need for <b>L&amp;D to be held accountable</b> . For what it's worth, you need to justify why do you need training. Why do you need support? Why do you need to put money in this so, I think, leveraging some data, what really helped, and L&D are not good at doing that you know, leveraging data.
<b>People Leader/ CHRO</b>	But when it comes to increases in revenue or increases in profit margin, increases in terms of customer experience or customer satisfaction. Those are all going to be quite indirect from a training perspective. But I still think <b>we have to hold ourselves to account</b> to achieve those. A training person quickly realises if I am going to hold myself to account to some sort of commercial outcome. We quickly learn the hard way that a training intervention is not going to achieve that on its own. When you have to look at it from a systemic perspective and what are the other strategies I have to put in place that will embed those skills and ensure that there is a sustainable change.

*Figure 67 Sample Emergent Themes*

This table also illustrates how a similar expression used by both the thought leader and CHRO also fed into a different theme around learning effectiveness measurement and analytics.

Finally, I grouped the categories by the interviewee group in a Word Doc and extrapolated the final themes according to their relevance by topic of discussion, as well as participants' unique experience and perspectives.



	Codes
y. All of the fires are t really have to worry agic, and we can going to develop their	Business strategy
know that we don't e can be more ss partners in and are	Business priorities
know that we don't e can be more ss partners in and are	Business partners
i most start-ups, the lves to take on other asically growing t acquisition team is d to hire 200 more	Priorities people function
i most start-ups, the lves to take on other asically growing	Talent management

Figure 68 Word Document Extract of Categories by Interviewee Group - CHRO

What finally emerged were five major themes, and sub themes within them. I also found areas for discussion and areas for future research. Though I hadn't intended on it, the data analysis and coding process led to the development of a framework that not only depicted the relationships between the themes that emerged from the coding process; but also served as a structured set of recommendations for the skills and remit of L&D.



## 6. Findings and Results

I set out on this research journey to investigate the role, remit and future of the corporate learning and development (L&D) function in organisational environments that are rapidly accelerating through technology. The aim was to establish if and when an accelerating organisation should introduce a managed learning function, and if so, its role, structure and remit. I imagined that my thesis would serve as an output for organisations, people leaders and learning leaders as they set out to define learning and development in the firm.

### Introduction

Moving from codes to categories and finally to themes, what emerged were both ideas on the structure and remit of the future learning function, but also viewpoints – how L&D and its leaders were perceived – by the market, the C-suite thought leaders and industry consultants. Themes also surfaced that were ‘not new’ to the world of L&D, such as feedback on its role, organisational relevance and metrics to assess its efficacy.

Based on the two key aims of my research, I decided to structure my findings around them, whilst making allowances for the audience category who expressed this. To recap, the aims of my research were:

- 1) Identify the conditions under which the introduction of L&D services or formalising an L&D function could effectively drive further growth and productivity within an accelerating organisation.



2) Specify the set of capabilities likely to be needed by L&D professionals operating in this environment.

From these, the primary themes that emerged were:

- The Introduction of the Learning Function in Start-up Organisations
- L&D Operational Structure and Remit
- L&D Capabilities
  - Foundational:
    - Adult Learning, Business Acumen, Technology and Data
  - Future organisations:
    - Systems thinking
    - Learning organisations
    - Performance consulting
- L&D Culture
  - Growth mindset
  - Psychological safety
  - Design thinking
  - Space for reflection
- Learning Impact
- The Future of Learning in Accelerating Organisations

#### [The Introduction of the Learning Function](#)

One of the first points of discussion with senior executives and HR leaders was when to introduce L&D in new and accelerating organisations. To this end, I aimed to gather the perspectives of thought leaders hired by new firms to establish an L&D function; chief people officers and heads of



functions charged with deciding when to introduce structured learning; and heads of L&D/chief learning officers tasked with establishing the function.

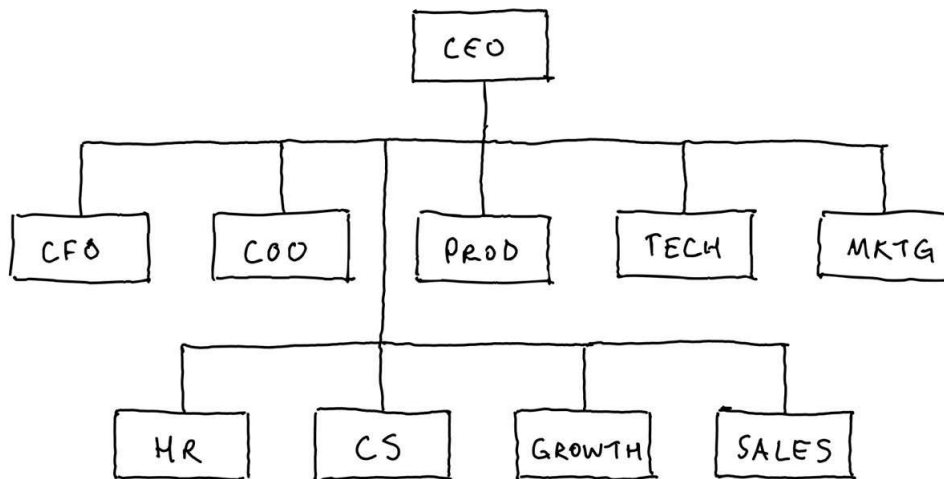
Some key questions addressed were:

- When is the optimal time/headcount to introduce the learning function?
- Whose decision is it?
- What should be its initial remit?
- What is the optimal profile of the first learning leader?

The data seems to indicate one overarching response – it depends – since there being no set way of founding a tech start-up. Usually, the founder is also the CEO and possibly doubles as the head of product and/or head of technology. When there are two or more founders, they seem to divide the roles of structure, raising finance, sales and product development – but there is no singular clearly defined moment when a start-up becomes an organisation.

According to Bailey (2021), this initial lack of role clarity isn't usually a problem when the team is small, and it can also increase a team's agility since problems can be implicitly assigned to whomever identified them. However, as the company grows, so does its need for structure. At this point, 'specialists come in to professionalise each area of the business, and reporting lines are drawn to ensure information flows up and down the organisation, enabling the CEO to remain accountable' (Bailey, 2021). In Figure 69, he recommends a structure for a software start-up, but not a timeframe for how and when to implement it:





*Figure 69 Bailey's Typical Org Chart for a Tech Company*

Paul Arnold, who was instrumental in growing AppDirect from 20 to 120 employees in its start-up days, says that whilst the concept of organisation can be off-putting to founder entrepreneurs, only those that introduce it and can delegate within it will survive. At the same time, he acknowledges that the rigidity of a typical boxes-and-lines organisation are contrary to the norm in most start-ups:

Entrepreneurship is typically defined by its flexibility – an 'everyone pitches in' energy that makes initial momentum possible. But this breaks down when you add more people.

He advises organisational structures both around product and functions but in both cases, HR, finance and legal functions sit under the CEO as shared services. By initiating structure sooner, he claims firms can set the scaffolding to create better teams comprised by talented people who work together on shared problems. In this case, organisation design becomes core to the firm's success as 'teams are able to accomplish more than the sum of their parts' (Arnold, n.d.).



So what does this mean for L&D? In reality, it means very little, because no matter what L&D does or how it evolves, the fundamental decision regarding its initial introduction and scope of action depends on somebody else, irrespective of the skill the L&D practitioner brings now or in the future. The decision of introducing the L&D function is made by the chief people officer, chief operating officer and sometimes the CEO. Again, its remit is decided by somebody in the C-suite, as is the timing for its introduction.

This isn't necessarily a bad thing. As a learning practitioner, I would much rather have the fundamentals of an organisation structure already in place before people development is considered. The instances described by both heads of learning and heads of business show that either the head of learning or the function itself will fail if L&D is introduced too early. Defining compliance and contractual matters around people is a critical first step.

The consequences of structured L&D being introduced too late is mixed, and usually triggered by an adverse concern to the business like attrition. The larger question is what problem the business is trying to solve by incorporating a learning and development function and whether someone with experience in the current construct of L&D is required to solve it.

I have presented the key responses of the interviewees and concluded with my recommendations:

[C-suite views:](#)

Start-ups bring in chief people officers when they begin to scale-up and recognise the need for organisation structure and regulatory compliance



with people. As P20 shared, organisations need the basic ‘scaffolding’ – wherein the first 50% of an HR organisation is in compliance, paying people, benefits, pensions, ‘all of the fundamentals that no one really wants to talk about’. Once clients, the operations and total rewards are under control, and business partners in place, the CPO decides to get talent acquisition more strategic – to build the workforce.

For CPOs, the last big hire is a head of talent development or L&D. This decision usually stems from the need to solve a concrete issue, such as clients who require certifications, attrition linked to an inability to see development or career progression, or the need for structured onboarding or manager training. It is almost always a reactive response or a natural consequence to an expanding organisation.

In my interviews, none of the chief people officers or business leaders mentioned that this was a function or a team. CPO P66 speaks of introducing L&D when the firm is deciding whether to build or buy talent. To them, the demand for skills and experience in tech is much higher than the market supply, so whilst firms should initially invest in talent acquisition i.e., recruitment to source and hiring of experienced technical talent to build the product, service and/or infrastructure, they must also follow with a ‘talent lead’. This role is held by someone appreciates the pace at which the organisation is moving – in new markets, new industries, new types of technologies – and realises that larger training organisations usually aren’t the most suitable to address the firm’s changing needs. For this reason, they recommend bespoke L&D solutions to promote development in scale-



ups because they will 'land far better with a huge amount of context of the organisation in it'.

P77 echoed this view with a caveat. Within HR, the business partner's role is expanded to primarily oversee technical training, followed by onboarding – which includes induction and compliance, and manager and leadership training. HR are aligned to functions or countries, and meet the need until they reach a scale at which they require a 'learning consultant' to manage the training workload. P77 later speaks of how this team is built to performance management, career and value development. At this point, when L&D is introduced, is firmly in Coomey and Stephenson's top left quadrant. As P20 says:

*You can't afford to have an in-house team of L&D. At a start-up [...] what you can afford is to prioritise: I've got these three things I need to do, what's the best content out there and how can I deliver it as efficiently and effectively [...] in a way that the employee has a greater experience.*

L&D is often never introduced. O51, a business leader in an early start-up firm with less than 50 employees and operations in multiple countries, spoke of expanding and strengthening the HR team, from a caretaker HR and admin manager and recruitment manager, to a chief people officer who would eventually take them to IPO (initial public offering) and market expansion. They didn't see the need for a dedicated learning function or role, and intended to turn to the market to expand capability as needed. The firm's viewed finding highly skilled technical people as its most pressing



HR challenge, and if it had a baseline for hiring, it would continue to buy from the market and have people develop of their own accord to work on the product and services offered.

P29 is another people leader with a unique structure and no L&D person or function. With over 50 operating companies under a group structure, they say their 'whole model is around empowerment and accountability and a very flat structure'. The individual companies range from a few hundred to a couple of thousand, and all are empowered to drive growth. Some of these sub-companies are in start-up, scale-up or hyper-growth, while others are established.

Across these firms, the only common learning intervention is leadership or team development. Called 'Innovate the Organisation', it develops company boards through a two-week team and leadership development exercise designed to formulate business and growth strategies and explore what it means to lead from a people leadership perspective. For everything else, individual firms or individuals within firms determine the need and find a provider, whose offerings are paid for at the firm level as opposed to the group level.

Whilst this is a unique organisation structure, the aforementioned two examples operate either in the bottom right of the Coomey and Stephenson model or disregard it altogether.

It raises an important question for future firms: who should hold the responsibility for development? And what development should be owned by the firm and what should fall under the individual's or team's responsibility?



These conversations have already started to happen, and among my interviewees, no two L&D leaders brought into accelerating firms had the same remit. Most often, it comes down to the vision of the founder/s or the understanding of L&D of the CPO or COO.

#### [View of Learning leaders:](#)

Among my interviews, L76 is a learning and talent leader with experience building the function in several start-up firms. One included a founder/CEO who highly valued learning and viewed as a strategic priority, who opted to bring in a head of learning before a head of HR, and prior to any formalised organisation structure. The basic contractual and administrative duties of an HR function was carried out by a junior resource, but the first senior hire into the HR function was the head of learning.

L76 initially felt energised by the organisational culture and its emphasis developing people and people developing themselves. Employees, mainly consisting of engineers and product-people, were 'faster, had naturally curious minds and constantly seeking something new' according to L76. People asked about books, where to find courses and access to resources. The CEO established a funding structure wherein every employee got a certain amount per month to purchase whatever learning they chose. As a small firm, this system worked, but problems arose once it grew to around 500 people.

With no communication on the business strategy, 'learning and development' became whatever an employee considered interesting. Without an HR operating model, a career framework, systems to track



overall spend and mechanisms to measure impact, costs quickly spiralled and the L&D leader's remit changed to introduce structure. With still no head of people, the founder/CEO's vision on leadership, team, culture and learning needs was the final word, and the delicate balance on when to let a workforce grow organically and when to introduce 'organisation' was lost. L76 articulates the learnings from their time there, which echoes the earlier CPOs I quoted: get the structure in place first. Put in the 'scaffolding' and establish the contractual and legalities – then introduce how people will learn. This CLO wanted to implement a framework that 'democratises learning', with learning partners who would act more as on-the-ground advisors or coaches dedicated to different functions to guide employees. This is harder to do when one has to undo practices, and the founder CEO's vision supersedes or overturns any people strategy or decisions. L76 further explained their view on hiring external consultants:

*At that stage, you need a consultant to put good HR [...] set-up. I'm not saying don't involve your internal people. Bring some externally, let them work with the internal team, engage them, reengineer that. Then you need performance management: bring somebody, let them work with the team, put that in practice, and then go. Learning same. When you build a strong foundation of HR, practices, structure [...], then you can start populating. Now you need a learning person. Now I need performance [...] I always combine this. I hate when they separate learning, performance, talent management.*



Learning leader L25 also mentions the model of allocating a fixed amount per employee for learning, with a difference. In their case, the accelerating organisation had a CPO and the 'learning marketplace' was the CPO's strategy. With an expanding organisation and the 'scaffolding' in place, the new learning leader's role was framed around onboarding, manager training and compliance. For everything else, there was a commercial learning platform marketplace, which the learning leader was charged to track and maintain. Employees receive a fixed amount of budget per head to use toward courses, books or other learning artefact or intervention on or off the platform.

Though it makes up two thirds of the firm's total learning budget, the learning lead has little visibility or control over its offerings. It is understood that experienced tech managers will guide their teams to the right tech skills they need – the spend is on development activity as agreed between them and their managers. The remaining third is under the remit of the learning leader for the platform, compliance, onboarding and leadership.

At the time of writing, this worked for the size of the company; around 60% of the budget was utilised, which the leadership cadre viewed as 'a good indicator of a strong learning culture and a group of people who are taking interest in and pride in and ownership of their own development'. This far, it remains an example of the learning leader's role situated in the top left quadrant of the Coomey and Stephenson model for four specific areas, and for everything else, in the bottom right.



L49 speaks of a different trigger. Their firm had a learning stipend for employees and had grown at a small pace over the years. Then came the funding and marked growth following acquisitions. The need for a managed learning function was expressed as a requisite for a unified culture and unified ways of working.

The L&D leader speaks of the maturity of people in terms of understanding the need to develop their skills in order to grow the business and enhancing human potential at an individual level, as well as the inability to link these efforts to overall team and business performance and the lack of structure to weave it all together across firms. Firm leaders shared their opinion to L49 that L&D had arrived around three years too late. L49 says:

*My boss [and I] both see L&D as [...] being about improving performance, being about helping people get stuff done, helping remove barriers to performance. When I joined [...], he was quite clear that that's why he hired me. And because he didn't want just someone [...] listing out a catalogue of events that people can sign up to, I brought a [design-thinking] lens to understand the problems, essentially a coaching lens to work backwards from there.*

L74 and L43 validate the experience of the role of first learning leader in a tech start-up – brought in for specific issues around onboarding and customer training or the need for specific tech skills. L43 splits meeting these needs into two: the people and the technology. They leave the onus of building the job-related skills within the functions, whilst enabling them



by providing the learning platform, software or access to other necessary resources. All three leaders sought to act as coaches and guides, whilst ensuring the presence of learning frameworks in the context of business-as-usual. As L43 shares:

*Usually around [...] two to four years depending on how fast they're growing, somebody will stop and say, "Actually, this is all a bit chaotic". We've got no processes, we've got no procedures, nobody is following the same sort of route to get from A to B [...] And now that there are x number of us, I don't think this is working anymore. They realise that having their best salespeople also teach their clients how to use the product is actually not very cost effective and it's not really the best use of their resources. And that's usually the trigger point.*

[My conclusions on these findings:](#)

So when is the optimal time to introduce L&D? I think the question should be rephrased to 'when is the optimal phase' – what is the firm's long-term vision and the specific role of its people in that vision? I do not believe that firms will always avoid a tipping point, but with some planning, the link between development, business strategy and culture can be established early. As interviewee T52 rightly pointed out, L&D would go nowhere if its efforts to develop individuals were not tied to organisational strategy and performance needs. Learning in organisations must be purposeful, and that overarching purpose must be business strategy.



An important observation is how much hinges on the vision and viewpoint of the founder. One could draw the conclusion that, in general, founder/CEOs of start-ups generally trust their people to develop themselves and funds them directly to do this. One could speculate that, in this early phase, the vision and charisma of the founder is what attracted the employees, and, in all probability, they were all either hired by the CEO or directly hired by someone in the CEO's inner circle. Therefore, they are likely to be aligned to his or her vision. So, although they are trusted to identify their own learning needs and develop accordingly, there will likely be a unifying purpose and general alignment to their efforts.

As they expand, organisations reach a point when this natural alignment cannot be relied upon. People may still be motivated to develop themselves, but may start to invent their own vision or direction. This goes back to identifying when that point or phase has been reached – when a group of people aligned behind an idea or person begins to evolve into an organisation.

Multiple entrepreneurs speak of the importance of both the 'structure' and the need to look after their people as the firm grows. The how and when differs, but it would best serve L&D to consider the circumstances, and as a profession, reflect on their role toward contributing to these issues. Essam Abdullah, the founder and CEO of TaxRise Inc., launched his firm in 2017 and quickly grew the company to over 100 employees with a nearly 400% growth rate. In 2021, he offered his firsthand insights on how to



successfully transition a business from a start-up to a mid-size company (Abdullah, 2021).

Of his top three tips to new founders, two relate to focussing on people. Abdullah says that entrepreneurs should first invest in lead generation and marketing systems and processes like regulatory and security that help build their practice, and second, develop clear plans for their employees. He describes this as follows:

‘...consider turning your current department-of-one into an entire team with special positions. Use your employees’ strengths and nurture their professional growth. Promote from within and invest in those who have been with you since the start-up phase. This helps ensure you keep the energy and culture you originally began with. Soon, you could have departments made up of experts, thus increasing trust in your business.’

His final tip is about taking care of people with policies around retirement, health benefits and other employment issues. He also encourages new founders to embrace a management style based on empathy and create an environment that makes people feel listened to, encouraged and taken care of.

He reiterates what other successful entrepreneurs have advocated over the years: recognising the importance of employees to the success of the start-up. As the founder and CEO of Virgin Group, Richard Branson once said, ‘Train people well enough so they can leave, treat them well enough so



they don't want to' and 'Clients do not come first. Employees come first. If you take care of your employees, they will take care of the clients'.

Founders and CEOs recognise the value of a developed and valued workforce, as do CPOs and other members of the C-suite. Hence, it becomes a matter of L&D recognising what this means for a firm and their role in promoting employee and firm success through development.

My conclusions and recommendations for this theme are summarised in Figure 70. The steps preceding the introduction of the people development/ talent development/ L&D function may not occur in the displayed consecutive fashion:

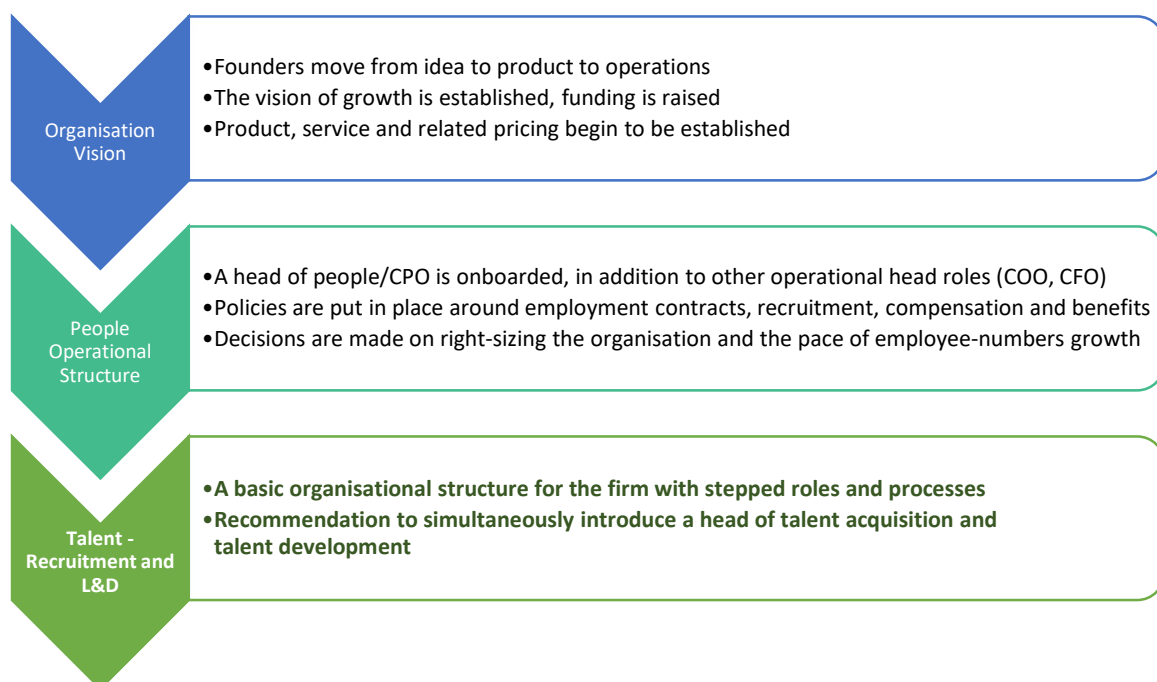


Figure 70: Introduction of L&D

- Whatever the vision is for learning and its function, some fundamental 'scaffolding' is needed from a people perspective before it is introduced.



- Tech start-ups are founded on the ideas and skills of the initial product and service organisation – their building on those skills and sharing the knowledge of the technology and product should not be impeded by structure or development process.
- Recruitment and L&D, underpinned by workforce planning, should be aligned at the outset.
- L&D begins with the establishment of the directive/instructive learning interventions. As described by Sweller and Kirchner in the literature review, these have their place for onboarding, compliance and management/leadership philosophy, as well as for entry-level talent that come directly from education and require more structure.
  - At the stage, it is important for the learning leader to understand the context within which they were brought in. How do you provide the structure for performance to thrive, whilst not constraining the social learning already under way? How do you encourage the social and experiential learning, whilst recognising the opportunity cost of experienced and customer-facing resources acting as trainers or guides?
- In addition to recruitment and workforce planning, L&D build a strategy to align to business and connect to performance, and establish frameworks to allow for free knowledge sharing and informal learning. This is further discussed later in this chapter.

At this point, I bring in a paper entitled 'Organisational Learning from Experience in High-Hazard Industries' (Carroll, Rudolph and Hatakenaka,



2002), as the principles put forward will be a recurring factor in my themes. Referring to organisations as 'learning entities', the authors seek to answer two questions:

a) How is local learning (by individuals or small groups) integrated into collective learning by organisations?' And 'b) What are the differences between learning practices that focus on control, elimination of surprises, and single-loop incremental 'fixing' of problems with those that focus on deep or radical learning, double-loop challenging of assumptions, and discovery of new opportunities?

I have discussed single- and double-loop learning in my literature review. Here, the authors propose a four-stage model of organisational learning as an alternative, which I believe is closer to how learning in accelerating organisations will evolve. These four stages are: '(1) local learning by decentralized individuals and work groups, (2) constrained learning in a context of compliance with rules, (3) open learning prompted by acknowledgement of doubt and desire to learn, and (4) deep learning based on skilful inquiry and systemic mental models'. Although the authors make no reference to Coomey and Stephenson, their four stages perfectly follow the vision for accelerating firms despite also using more regulated nuclear and chemical organisations as their base.

[Constructing a model:](#)

I have combined both models and presented this in the context of the introduction of the L&D lead into the organisation:



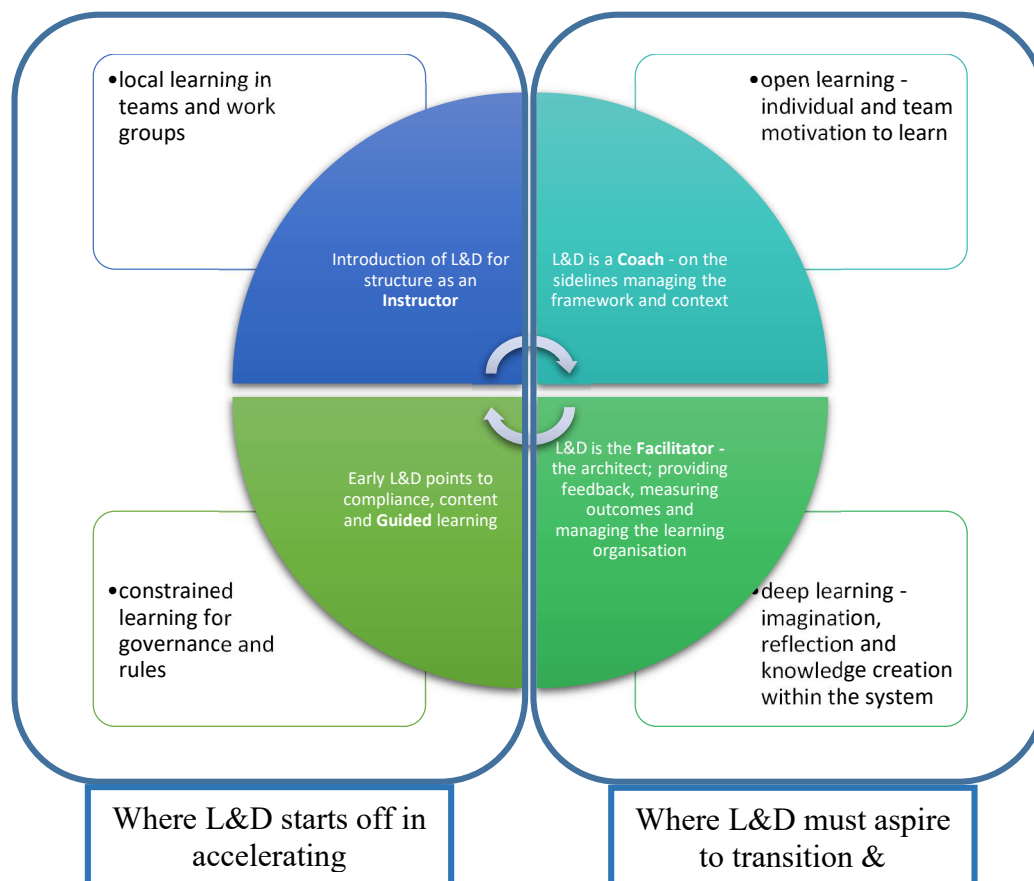


Figure 71: The Introduction and Evolution of L&D in Organisations

The framework in Figure 71 recognises where the learning function starts – but also where it must aspire to go to. There is no silver bullet regarding when to bring in technology, and there is little that points to the specific skills the first L&D employee should embody. I explore all of these further in the following themes.

### L&D Operational Structure and Remit

From my literature review and through the responses of several interviewees, the recurring tussle has related to a few fundamental questions: Who controls learning? How much of learning should a function control? And what does that mean for the organisation in practice? L31 offered these insights:



*They should allow people to create the muscle to learn or develop the idea of learning how to learn. To know – how do I navigate all these tools? How do I make sure that I'm actually learning on the job? [...] Everyone says that they're learning on the job, but most people actually don't. If people actually learned on the job, people would stop making the same mistakes. But they keep doing it and so until you consciously decide I want to learn, how am I going to learn it, you don't learn anything.*

In larger established firms, the L&D structure could be centralised (the entire learning function sitting in head office, along with content and technology) or federated in functions or locations with distinct remit of what responsibilities sit where. For L16, it's a balance between L&D centrally empowering functions to make business decisions, and the central function advising on what they need to know and how they need to do it to ensure they're successful.

L16 represents an organisation going through large digital transformation, having brought their expertise from a hyper-growth firm and their own research. To them, it has been about establishing the right organisational structure and governance, that, on the one hand, doesn't remove the ownership in the organisation for issues such as people development, creating functional technical training and building mastery in their diverse business ecosystems.

On the other hand, this approach also gives their firm the value derived from doing some things as an enterprise – for example, enterprise-



leadership knowledge is kept central whilst sector or business-domain, functional or technical knowledge is divested. The remit given to them by the CHRO was to create a culture that was more 'agile, empowered and accountable' with learning priorities firmly tied to business strategy.

L23, with a similar background and remit, explained how their organisation had also implemented a federated model: a 'relinquishment of control of the technical or job-based learning that happens on-site where needed'. They described their job as organisational development – the person who is responsible for the 'systemic strategic approach to creating ecosystems and cultures and frameworks that facilitate learning and encourage learning'. They allude to the shift in the L&D role from delivering content to cultivating an ecosystem that facilitates learning every day:

*You need to get in front of the design of the systems and in front of the design of the environment that people work in so that you can build the capability to learn how to interact and leverage and use these systems and environments to do the best work you can do.*

I found the responses of these leaders fascinating. Their remit is vast organisations with tens of thousands of employees. They recognised the role of the learning organisation and the framework and relationships within the system that connect learning to performance to business strategy. They never mentioned not having a 'seat at the table' or feeling disconnected from the business. They were very conscious not to be seen as a division that simply rolls out courses and produces content. They understood that



they must constantly show value in terms and measures other than what L&D usually expresses itself in – like happy sheets, number of people trained or hours spent in learning.

These insights align with the literature on the learning organisation by Argyris and Schon. I delve deeper into this subject in subsequent themes but it made me wonder: if back in 1978 scholars were urging organisations to integrate norms, strategies and processes in order to unite employees under continually tested and challenged frameworks and promote continuous socially-based learning and innovation, why is there still inconsistency among learning leaders on how they implement and manage the function? Using my aforementioned framework, what stops learning leaders from transitioning from the left quadrants to the right?

For me, this viewpoint is an important place to start when discussing the remit of an organisation entering hyper-growth with one dedicated L&D person at the most. P66 shared these views:

*I think learning and development comes into a people strategy when you've got the foundations [...] If you add it in too late, it's always going to be seen as a 'nice to have' and for me, have no credibility. You got to put it in at the right time.*

#### [Views of Learning Leaders](#)

There was little overlap among learning leaders' experiences, with inconsistencies regarding when they were brought in, their remit and degree of autonomy to shape the firm's direction of learning. L25 said the



direction definitely came from their HR leader, who defined offerings for managers and new starters as corporate priorities:

*[...] the sheer number that are transitioning into the company or transitioning into management roles is going to be a much higher proportion for a scale-up than it would be for a large established company. [...] So, we also need learning and development because we talk a big deal about careers. We need to be helping people develop and grow, and we need managers who can manage. We need new joiners, who can join the business and start ramping up and making an impact as quickly as possible. And we don't have the coverage for that now.*

CPO P77 sought to keep greater emphasis on experience-based and informal learning, and in turn, wanted their first L&D leader to focus on areas like mentoring and reflection so that learning was perceived less as individual events and more like continuous development. That said, the initial focus remained on getting the basics in place, with L&D strategy seen as a more aspirational endeavour.

In this respect, my main observation is the fundamental hole in the logic of L&D on how much they can initially control. At the start- and scale-up of the firm, L&D is not at the table, and hence plays no role in defining the firm's learning direction. When L&D comes in, they are brought in by those who set that early vision and direction – and L&D then runs with it. What the L&D function does to shape the vision determines its value and can



potentially elevate its role. Nonetheless, it is important to call out the reality of the span of influence and control.

Another interesting perspective was expressed by both P77 and P66: as CPOs, they recognised the value of talent management, yet didn't consider it as the remit of L&D. P66 talked about 'capability mapping and succession planning, performance management around strategic thinking, communication, and giving feedback' but didn't see this as the remit of the L&D employee, at least not initially. This view highlights the market's perception of 'learning is training'. Through this lens, L&D sits in the left quadrants, brought in by the firm to 'fix problems' through the delivery of skill-based training.

Ironically again, I interviewed several learning leaders who began in scale-up hyper-growth firms before moving to large, steady-growth and digitally transforming organisations, whose current L&D remit was far wider and, in many cases, included talent management or parts thereof. As L16 said:

*I don't love the chief learning officer title. I am the vice president of talent development, and because our talent is very important, and talent is at the top of the CEOs' agendas, high up in their top three, especially if they don't believe they have what they need to deliver on their strategy. [...] I don't force them to learn, they have to learn on their own [...] I have to put the right experiences in their path and get them to recognise, get them the mindset that helps them recognise what's learning, and how to apply it for*



*better business results. Everything else, is overall development of talent.*

My takeaways of these findings:

I couldn't find a definitive point for the remit of L&D begin to change, or a why or how some L&D transitioned to broader talent management and some did not. With varying remits and no mention of a team other than the L&D lead, it is difficult to speculate, although this theme does offer key takeaways and areas of consensus:

- i. Flexibility and agility are key. No two days are alike in a start-up, and both the number and make-up of the workforce is constantly changing. The firm's strategy is always evolving, its locations expand or change, and its acquisitions and partnerships might increase the product and/or service portfolio. The key for anyone charged with developing the workforce is the ability to move quickly from one initiative to the other and adapt to an evolving organisation context. T12 likens the process to 'triage' in a hospital emergency room.

*You just simply can't respond to business needs as and when they emerge. [...] it needs to operate much more like an A&E or an emergency room, where it's not first come first serve. As L&D professionals, we need to have a plan and a new operating model to decide how are we going to prioritize. [...] And you have to build into that performance consulting at scale. So that means that every request gets analysed for evidence of need [...] You triage*



*those requests to see what makes sense and what doesn't,  
because at the end of the day, your resources are limited.*

- ii. Learning systems need to be contextual. Focus on the 'local' and 'constrained' to implement structured learning around compliance, manager training and onboarding. Stay aware of the timing of each but start to consider how to transition the organisation to open and deep learning. Knowledge is being created and shared across functional teams on a daily basis. Once L&D has dealt with the 'directive' now, the focus needs to evolve to the facilitator and coach role.

A small caveat on manager training. Though manager training should be addressed whilst L&D is still in the left quadrants, it does not necessarily call for directive learning. In his paper 'Wicked Problems and Clumsy Solutions: The Role of Leadership', Grint (2008) says that, in environments of constant change, organisations are confronted with wicked problems whose solutions require a bricoleur approach by leadership. Referring to these as 'clumsy' solutions, he says they acknowledge the inherent complexity and uncertainty of change. When presented with a wicked problem (concept introduced in the 'Context' chapter), he posits that the role of leaders 'is to ask the right questions rather than provide the right answers because the answers may not be self-evident and will require a collaborative process to make any kind of progress'. He describes clumsy solutions as those that involve experimentation, adaptation and learning from failures.



Every scale-up is faces continuous change and presents its own set of wicked problems. When addressing managerial and leadership development, 'clumsy' solutions must be explored alongside directive ones.

- iii. Connect to talent processes instantly. In order to understand the role of L&D, it is important to have a common definition of talent management, which as Ansar acknowledges, can vary in the context of academia and organisation. He calls it the 'systems or processes which enable organizations to identify and predict long- / short-term human capital requirements and how to fulfil the same' (Ansar, 2018). This definition has a distinctive talent acquisition/recruitment angle to it.

On the other hand, Warren (2006) refers to it as 'the identification, development, engagement, retention and deployment of talent, although it is often used more narrowly to describe the short, and longer, term resourcing of senior executives and high performers', which acknowledges performance management, L&D, succession planning and recruitment.

These nuances are important for the L&D context: understand the hiring needs and process and the profiles of people coming into the firm, since they are L&D's customers to develop. It has always seemed strange that after people join the firm, their skills and professional development becomes the responsibility of another function that wasn't part of understanding what they brought to the firm and why.



Once a firm is in the hundreds and L&D is disconnected from the talent acquisition process, it is difficult to reverse-engineer the process and form part of the firm's strategic workforce planning. In my view, this is one reason behind the purchase of generic content libraries and mass learning interventions: L&D disconnected early from the workforce profile, as C-suite C63 member articulates:

*When I run a company or I build companies, I don't start with how much learning I can buy. It's how little do I need to give to people so that they can be empowered to do their job and be really effective at what they do. Learning is at the very end of the continuum. They often don't take HR director seriously, to be honest. They quite like talent acquisition [if it pertains to] the acquisition of people who might make them money. [...] Learning is initially a remediation [for] talent [that] doesn't do quite what you need it to do. But it is not in its own right a function within an early company unless the company is in some way dysfunctional.*

Whilst this leader appreciated their view was somewhat extreme, their frustration was apparent. And it comes back to how L&D initially positions itself and how quickly it transitions to demonstrating business value to enable a 'build-versus-buy' or 'develop-versus-hire' conversation. If L&D views every business issue as a nail it can hit with a learning-content or course hammer, it will always be viewed as remedial or disconnected.



- iv. Connecting to performance management. My literature review speaks of performance consulting in both a theoretical and business context. For this section, I define performance management in the context of the responses received. Armstrong (2006) describes it as 'a systematic process for improving organizational performance by developing the performance of individuals and teams'. I delve into this issue in multiple themes but quite simply, when a performance management process is introduced, L&D must connect to it. At the very least and at this stage, on two levels: to start connecting the impact of learning on individual performance, and to have data from individual development planning inform L&D planned interventions or strategy.

Understanding how learning impacts performance is a fundamental skill that L&D need to incorporate and connecting to the process is a start. L45 describes this imperative by quoting the '5 Moments of Need' theory:

*You don't get knowledgeable in plumbing by just having a training program anyway. It [takes] years and years of apprenticeship [...] but that's a classic example of performance support in the moment of need, which is what Mosher and Gottfredson talk about all the time. I'm not going to make that worker an expert in plumbing, but I'm going to give her the information she needs to solve that customer's problem right there [...] Over time, she may not need as much of that information, but that's the simple way to really apply performance support in a model where I don't have the workforce*



*that's capable to meet that customer where they're at, necessarily.*

I believe L&D's interaction with performance will be on many levels within the organisation and require the development of several skills within itself. Building on those skills will enable greater cohesion to internal performance processes, be they business, individual or team.

### [L&D Capabilities](#)

In all of my interviews, every learning leader from accelerating organisations and thought leader agreed that the relevance and utility of learning professionals and functions required a change in their value proposition and offering by embracing a different skillset or a differently focused skillset. I separate the skills that emerged from both my conversations and literature review into two categories.

First are the recurring themes and issues most frequently discussed in learning forums. They appeared recurrently in my conversations, but also in learning lists and surveys as skills needed by L&D leaders in all contexts.

These skills were articulated in various ways by various learning leaders:

*I think there are three key areas that learning leaders need to have to call themselves able to do this job. One, business acumen. They do need to understand [who] the drivers are, they need to be able to build the right relationships in the business so at least they're in the conversations and they understand what the strategies are. Two, learning acumen. [...] You need to understand when formal and even less formal training*



*interventions apply. When are they necessary? What is the difference between what we need to do versus what we need to not do in our training strategy? Three, in today's world, you have to [understand] what's going on in technology so that you can leverage it appropriately for your learning team, and [...] put together a learning technology strategy that [...] advances the needs of the business, but also [allows engaging in] conversations with the investments that are going on in technology. Because I can guarantee one thing: every business on earth now is a technology company.*

T12 concurred on the need for L&D to develop their skills in these three areas, and also added critical skills awareness and data analysis. T62, who runs a university programme for L&D professionals, also reiterated these three realms and added adult learning and research methods to ensure the use of evidence-based learning and leadership practices.

Based on my experience, these insights are either intuitive, or at least not new, for L&D professionals. The L&D function is surrounded by learning technology options, recognising that employee data beyond training hours can inform impact and support business cases for future learning as discussed under the Impact theme. L&D is also aware of Knowles' adult learning theory, regardless of whether they practice or apply its principles every day. These are areas covered in my literature review and yet they arguably still put L&D firmly in the left quadrants.



My intention is not underestimate their importance; I continue to touch upon these in this paper around learning strategy and evaluation. In every organisation, it is vital that L&D connects to the business context and understands the commerciality of the business. In my findings, I aim to centre on what will distinguish learning in the firms of the future, in broader organisation development and its principles of performance consulting, learning organisations, and systems thinking.

My conclusions regarding requisite L&D leader skills:

In conversation, learning leaders and thought leaders touched upon the alternative to how L&D could operate – when it thought beyond courses, content and platform. They express this as follows:

*The role of L&D people is around 'how do I nurture learning as opposed to designing a learning'. How do I create the machine, the network, the frameworks and the technology that allows people to design their own learning, design their curriculum, and get it when they want it. – L31*

*... in that transition (to a scale-up the firm) ...being a professor was no longer what was needed. I needed to be a facilitator. And that was a super-difficult transition for someone who had been an instructor and a consultant. I was really used to lots of telling and as a facilitator, I needed to be more about asking and listening and guiding conversations and keeping folks on track. (L16)*



*How can we get people stuff that's going to be helpful to them at point of need? It's all about their performance, it's not so much about their learning. (L25)*

While there were references like the above, specific skills such as systems thinking for the L&D professional, the ability to create a learning organisation, and the role and application of performance consulting were not explicitly called out by any of the respondents.

References to performance management were around L&D support (usually through courses) to improve individual performance. Discussions around the divestment of control in the L&D function, informal learning and frameworks didn't specifically refer to them as a systems-thinking skill, and the definition of a learning organisation varied or was used interchangeably with learning culture or the learning function.

Thought leaders were closer to the specific calling out of these skills, though not always in the same terms. T22 called 'business acumen' and 'understanding the framework of the business' as 'rapid workflow analysis', described as 'how do you look at and define the workflow to perform the work, not the content outline to teach the work'. T30 quoted the 70:20:10 model to advocate the value of informal learning and performance consulting, and to show that not every business problem stems from a knowledge gap that requires a learning intervention.

*You really should be doing performance consulting upfront, and a solution might be a job aid. It might be a change in incentives. It might be for them to have a re-org. It's not always going to be*



*about knowledge and skills. When it is, a course is necessary or maybe depending on where they are, on-the-job learning. I don't see L&D thinking enough from novice to practitioner to expert and the value of formal learning going down and the value of informal learning going up.*

Understanding the principles of system thinking means understanding the framework of an organisation and how data connects to knowledge and wisdom within the context of work (Williams, 2014), and acknowledges that an interdisciplinary approach is needed to tackle the unique and complex organisational challenges (Westover, 2020). Performance consulting entails using a broader lens, understanding underlying business issues and establishing a framework to assess organisational performance gaps, analyse their underlying causes and detect possible solutions (Gilbert, 1978:21), which may include a learning intervention. And it is vital for the learning leader to understand and implement the characteristics of a learning organisation wherein learning occurs through both formal training and experiences, interactions and feedback, with emotional engagement acting as a linchpin for individuals' learning and retaining (Hess, 2014).

In Figure 72, I leverage the learnings from my interviews and literature review, and build upon the concepts of organisational learning to reflect new skills needed in L&D.



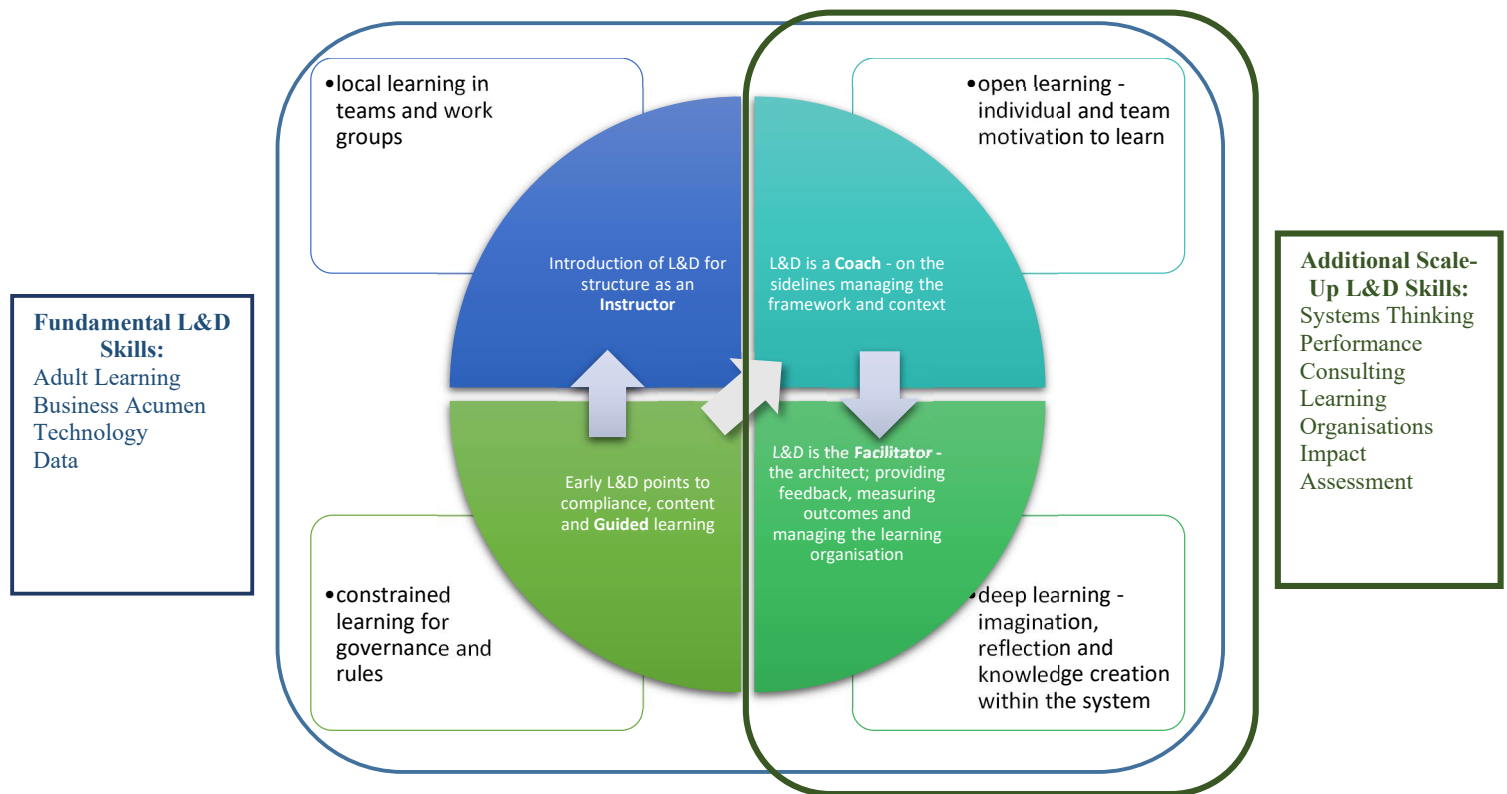


Figure 72: Learning Framework with L&D Skills

I believe that firms that are scaling quickly –the firms of tomorrow – L&D will either be specialist or a ‘luxury’ as T59 and L31 say, needed when the organisation needs to hit a ‘we develop our people’ checkbox. Organisations will look to those who understand human performance in the business development context, who can put in place connectors of learning to application to results, and who will create an environment of continuous growth and ‘psychological safety’ (Edmonson, 2018) to learn through experience and controlled failure.

A learning consultant interviewed narrated a story a venture-capitalist-backed start-up that had just hired a chief people officer. The CPO was analysing what was required and what needed to be integrated since the firm had grown rapidly through acquisitions in different parts of the world. In the CPO’s words, ‘I just need learning to do stuff. I need them to on-



board; I need them to create a common branding...I'm not going to invest in learning strategy. In a start-up, strategic L&D is a luxury'. This concerned the L&D professional, who worried, "Oh no, the more we are a luxury, the more dispensable we are'. I concur with this opinion. After all, anyone can buy a learning platform. Anyone can buy content libraries. Anyone can hire external training companies to deliver almost any training requested.

The value proposition for an L&D professional are the skills to understand adult learning in the business context, the system factors that contribute to performance, and how this can be reflected in the workforce and the organisation's success.

#### *A Short Note on Standardised Skills*

Is there a formal education path for L&D? Where would one begin to make a fundamental and systemic skills shift? The short answer is there isn't one specific place for this – and one doesn't need any formal education to work in corporate L&D. Thought leaders and fellow learning professionals have repeatedly pointed out how low the barriers of entry are to the L&D profession. As T73 shares:

*First, there's no industry definition of L&D, right? Anybody can pivot into L&D. There are former schoolteachers. You get former HR people. You get people that were former IT folks, and they all came with their own different perspectives. So, they're going to bring different skillsets. And sometimes I find it's not reasonable to ask everybody to upskill on this and learn about that. But I think*



*there needs to be a basic foundational knowledge, which we haven't really standardised [...]*

In global organisations, senior managers seen as 'being a people person' are often appointed as heads of learning. In the public sphere, a certain government department put one of its leaders someone in charge of learning as a way of removing them from a customer-facing role. Formal qualifications vary among countries, and from my experience and research, there was no 'must have' global standard for a learning professional. T59 had this to say:

*There's no oversight in our industry. There's no certifying body that's singular [...] There's no organisation other than some of the big professional groups like ATD or Learning Technologies or Training Magazine, or any of these folks that all have their own certifications. Of course, I wouldn't trust any because they're so in the pocket of their vendors. Let's say [...] I go back and get a master's degree in instructional systems design [...] except, who am I taking these studies from? People who didn't do well in the business to begin with? Or adjunct faculty who have day jobs and don't have the time to teach properly? [...] A lot of these programs are not consistent, because again, no oversight.*

By sharing these perspectives, I do not mean to question the need for formal qualifications in L&D; I do not claim one is better than the other. I cannot speak to the validity or value of certifications or degrees. I decided to end this section with these quotes and highlights to demonstrate that,



whilst we can arrive at skills for the learning professional of the future, it is far more challenging to concretely recommend or mandate how or where we get them from.

### L&D Culture

Once we have established the timing of introducing the learning function, its role and remit, and the skills of a learning professional in an accelerating organisation, the next discussion was on what the learning culture for the organisation should be.

L&D strategy was not explicitly called out in any interview, but a culture of learning was mentioned often. Tangentially, what L&D should do, be and deliver was a part of all discussions, yet this might reflect the constant state of flux in the organisations that prevents L&D from considering a longer-term strategic view.

At this point in time, I draw upon the teachings from systems thinking, extrapolated to start-ups and scale-ups. This is L&D's opportunity to recognise the interconnectedness of an organisational system at the outset and connect the links between individual knowledge, behaviour and performance with the wider context of organisational growth and performance. According to Britz and Tyler (2021), most workplace culture efforts focus on changing behaviours, an approach they view as futile unless behavioural shifts are integrated into and supported by systems, processes and rules that guide them. As they observe, systems unconsciously define behaviours, which affect organisational beliefs about



the workplace functions, and a combination of beliefs and behaviours determine workplace culture.

Whilst speaking of start-ups, scale-ups and hyper-growth firms, the foremost characteristics are agility, pace and ambiguity, which means the learning strategy and culture should equally be ready to flex and pivot with organisational change. There are, however, some principles that should underpin people development in new and accelerating firms.

Referring back to the Crossan, Lane and White's paper on organisational learning, Britz and Tyler examine the four stages of organisational learning: intuiting and interpreting on the individual level, and integrating and institutionalizing on the organisational level. Later in the chapter, these are mapped in the context of the Coomey and Stephenson model to show how accelerating organisations move along the transitions.

Leaving the word 'strategy' aside, the following section explores what learning facilitators should do in order to guide the firm through different stages of its development. These themes emerged from all of my interviews and from some works in my literature review.

#### Growth mindset

The term 'growth mindset' was coined by U.S. psychologist Prof. Carol Dweck in 2016. She differentiates a 'growth mindset' from 'a fixed mindset', espoused by people who consider their talents as innate gifts. People with growth mindsets, on the other hand, worry less about appearing smart and dedicate more energy into learning. According to her research, employees in organisations that foster a growth mindset report feeling more



empowered, committed and supported to driving collaboration and innovation.

It is easy to see how this mindset can support an explorative, collaborative and informal learning environment. As L16 pointed out, people turn to Google, YouTube and other online content every day in order to advance their learning:

*[I couldn't understand why], when they walk in the door, it's like they check their brain at the door and they say, well, you didn't tell me. And so, we are driving this notion of growth mindset. Stop worrying about looking good, worry about getting better and be[come] self-directed. Go find what you need!*

What should L&D do to develop a growth mindset in accelerating organisations, where individuals feel motivated and driven to their own development? When does it start, who owns it and how can it be nurtured in the organisation?

In the opinion of P20, a growth mindset should be addressed at recruitment, since the volatility and pace of start-ups and scale-ups require individuals with some element of flexibility and drive:

*They say that if you're resilient and you're curious, you can grow and learn like no other time in your entire career. Because you're being asked to pivot to things differently. And some humans really thrive on that environment, other humans absolutely don't.*

This is very relevant to organisations today. From my experience, some people are better than others at coping with ambiguity and change, and



these profiles are the ones that thrive in accelerating organisations. Jones, Ashcroft and Brown (2020) underscore the importance of curiosity, which is the essence of the skills needed to successfully navigate in a digital age in which all futures are uncertain.

More organisations are including growth mindset in their interviews and recognising it as a vital innate skill that is can built upon. According to Lerner (2022), recruiters should ask candidates three questions in order to assess their growth mindset: first, what they hope to learn in this role, second, a recent mistake they made, and third, if they have any questions for the recruiter. This last question allows discerning if they are genuinely excited and curious about the position, while the others reflect their understanding of the business and its opportunities. Having employees who are naturally disposed to learn and possess a growth mindset is a far stronger foundation for the firm and the learning function. As P77 shares:

*I think there's something about people who are very open to learning, which is almost a proxy for cognitive flexibility, in that ability to not just take what you know, but to be able to really look at context and say, what does it mean? And what can I bring and what may I also need to learn? [...] I think that's definitely something that we look for is that kind of growth mindset - people who are very open to learning, because I do think it's a good proxy for cognitive flexibility.*

This reinforces my argument on the connection of learning to the talent acquisition and performance management strategies of the firm. One could



arguably say that it is the same person executing on all three at the formation of the organisation. If the skills required to do all three of these are acquired experientially or with relatively minimal formal learning, then logically, a headcount-conscious start-up would and should look at consolidation.

#### *Fostering a growth mindset*

Once an organisation establishes its employee pool, how can it cultivate this framework of curiosity and drive for self-learning and growth? Johnston (2017) points to the wider organisation culture, calling it the basis for strategy execution. He places the responsibility firmly with the HR organisations in partnership with leadership to recognise that individual mindsets impact organisational culture, and developing the former is extremely important for defining the latter. Taking these views a step further to the role of the people function, Devalekar (2021) offers the following six recommendations for organisations to promote a growth mindset and enhance performance in the digital world:

1. Focus on learning and scaling up and the promotion of ongoing learning.
2. Set up an innovation hub or a digital or physical space where your employees, clients and customers can learn and collaborate to 'encourage innovative thinking and empower people to push the limits'.
3. Focus on peer-to-peer learning initiatives like the Googler-to-Googler network, whose 6,000 volunteer employees learn from each other collaboratively.



4. Encourage employees to keep abreast on new trends and technologies thinking beyond business as usual.
5. Encourage feedback across an organisation – seek ideas and feedback from employees across the organisation and don't be defensive, as employees tend to model their leaders' behaviours.
6. Recruit high-potential team members with a proven track record of hard work and creative thinking who will challenge you and your leadership team. Once they are onboard, ensure they similarly hire people who challenge them.

These recommendations highlight the importance of talent acquisition and reinforce the interconnected nature of the people process in the success of scale-up organisations. P20 references the role of the leader in communicating this vision to employees:

*And it's the managers' nature and leadership responsibility to create the narrative of why this [recruiting high-potential talent] is not a bad thing. 'You're not being layered, you're not being discounted, we're giving you a better platform to grow. [...] we're bringing in people [...] who have more experience [...] by the ability of you learning from them, we're actually amplifying and accelerating your own trajectory'.*

#### *Setting the Tone*

I believe L&D in accelerating organisations have a great opportunity to set the tone for developing organisational culture. It is a small window though, and heavily determined by what the first learning or people leader does. If



we lean towards directive and courses for expediency and ease, the tone of the organisation will follow. It will be set to every business problem 'nail', every skill need 'nail' is followed by the request to be hit with a course 'hammer'.

Communications; safe spaces to learn, reflect and apply; the acknowledgement of creativity; reinforcing the message that employees are empowered to build their careers through their development; and creating the frameworks to make all of this happen are key to the success of any learning leader and culture in the organisation. Both T62 and L16 concur on this point:

*Now they [L&D] are focussing on how you change someone's mindset to make them more receptive to learning. If you can get the mindset right, people will sort themselves out in terms of learning. And they will know what they need to do...the competence they need to acquire for the job without anyone having to tell them [...] One of the key elements of a growth mindset is a belief in yourself as a learner [...] , and if [you can] create an organisation where every single person believes that they can learn [...] the impact will be way bigger. (T62)*

*Don't force them to learn; they have to learn on their own. That's their choice. I have to put the right experiences in their path and [...] get them the mindset that helps them recognise what learning is and how to apply it for better business results. (L16)*



This focus on mindset is not universal; as L45 shares, questions around growth mindset are rarely part of recruitment or performance discussions. From experience, after organisations reach a certain size, the inclusion of growth and development in performance conversations depends on the individual manager, and its importance is significantly diminished by the achievements of targets and performance goals. This common reality leads to questions like that posed by L45:

*How many people do we hire based on growth mindset and not based in the CV? We interview through the accomplishments and performance etc. We don't interview by asking 'tell me the last time you failed completely. Tell me what you learned'. Similarly, how many people do we promote on based on growth mindset primarily? Can we say to the organisation, 'We're going to forget about performance; we're going to talk primarily about growth mindset' [...] And often the answer is obviously, none.*

A growth mindset also ties back into the concept of lifelong learning (Weise, 2021) examined in my literature review. Amidst the rapid pace of technological advances and organisations operating at constant change, a mindset that embraces the desire to continuously develop and evolve is more critical than ever.

#### *Transitioning to Grow*

Finally, I'd proffer the possibility of growth mindset leading employees to leave an organisation. When considering why individuals leave organisations, we currently look through just two lenses – dismissal as a



result of poor performance or regrettable attrition, when employees leave for better opportunities. In a fluid world of organisational change, companies should also view employee churn through the lens of people moving between constantly evolving organisations to grow and learn and contribute and return. This has wider implications, especially in terms of talent acquisition and development costs which haven't fully been researched, but in the context of accelerating firms, T62 provides an interesting case study for talent that outgrows and later returns:

*[Imagine] the CEO says to his staff, 'You've been with us three years. You've done an amazing job for us, but I don't think we can offer you anymore. You are not growing. You're at a point where you need to get out of XXX [and] find another really interesting organisation. Go learn. Go grow. Come back to us in a couple of years maybe and we'd love to have you back because by that time, we'll be ready to take you to the next level'. [...] They have no job descriptions essentially. You do the job that's appropriate at that moment.*

#### Psychological safety

I have added this category within my theme despite it not being referenced specifically by most interviewees. I add it because its definition came up widely – freedom, experimentation, security, failure, risk, improvements – and many such words encompassed in the definition that Amy Edmundson proffers. T30 encapsulated this best:



*Amy Edmundson has been doing really great stuff here. With her colleagues, Gino and Garvin, they identified the elements of a learning organisation, not from Senge's perspective, but from what successful businesses actually had in place. And they talked about the elements of learning culture that included, as I mentioned psychological safety, time for reflection. Not just tolerant of diversity but leveraging diversity. Recognising it, valuing it, putting in place what is just to systematically bring people together in diverse ways and figuring how to manage that process, to get the best out of people. And open mindedness to new ideas. Then you have to have experimentation, but smart experimentation, where you know what the outcomes will tell you and how you will use them in taking the values of that then you bring in the technology support practices like that and you're really going to have a transformation.*

#### *Combining Growth Mindset and Psychological Safety*

By their nature, scale-ups and hyper-growth firms are scaling and evolving at a great pace. Part of embedding the growth mindset is providing the safety to experiment with trying new things, failing, learning and trying a new approach. In this context, T30 suggested L&D's role is to provide the framework to capture these dynamics to ensure a cascade of the learnings for others and future employees. I believe this is the opportunity for the L&D leader to set the tone and environment for how learning will work in the firm: to guide employees to experimentation rather than imparting



courses, and to coach through failure, learning and trying again whilst improving on the last time. As T22 comments:

*There [are] a lot of skills if you set up the workflow correctly and you build the right infrastructure [that] learners can learn while doing, safely. Now they might screw up, they might fail. I'm not saying that doesn't happen, but what I'm saying is the outcome of that failure is not so catastrophic.*

In a 2011 interview, Harvard Prof. Shikhar Ghosh said, 'The more that you can embrace all the little failures you have, and treat them as ways of improving the system, the less likely that the entire system will collapse' (Nobel, 2011). There are two messages to unpick here. The first is that failure is hard and it is human to feel disheartened by it. It is equally hard to create an environment that accepts failure and treats it as learning.

In her dissertation on psychological safety in start-up organisations, Barhydt (2023) recognises the inherent difficulty in examining and learning from failures and the courage necessary for people to admit mistakes, especially in professional environments since doing so may put their livelihood and reputation at risk. As P20 describes:

*I've been in that environment where ships changed every two weeks, and you just have to say, 'I'm not losing it'. We're just iterating so quickly because we're growing that fast [...] It leads to all sorts of individuals' feelings unless you create the environment that celebrates failure and makes people feel as if they're failing constantly. And you say, 'No, that's how we learn'.*



*That's actually great, but it goes against human nature to actually feel good about that.*

The second is the importance of the system and the framework: the idea that every experiment carried out safely within an organisational system can consequently and tangentially impact the success or failure of the system itself.

The final element of psychological safety to highlight from the research is the role of the leadership. In their paper on proactivity, Martínez-Córcoles and Zhu (2020: 4) stipulate that 'employees who feel safe to speak up and contribute in front of their leaders (with upward psychological safety) are willing to go beyond their formal roles for the sake of the firm (challenging role orientation), resulting in enhanced proactive performance'. According to their research, in contexts with 'high levels of perceived uncertainty' – characteristic of accelerating organisations – 'upward psychological safety is a stronger predictor of proactive performance'. P29 highlighted how leaders can create this environment:

*The ultimate leader of that business, who engages his or her staff and talks about learning big on the job or through experiences or through rotations or through reading or through books or through whatever, and has an acceptance of failure, is what creates the learning environment or culture.*

There is a bit of an irony to this. In the same interview with Prof. Ghosh, he states that more start-ups fail than succeed, and speaks of serial entrepreneurs who sit on boards in the Silicon Valley, where a failed



organisation is often seen as a badge of honour. In his view, it is important for leaders to consider individual failures as a potential asset since the process to correct them can prevent the entire system from failing. However, this is possible only 'if the executives are willing to view failure as a potential for improvement'.

Learning and people leaders need to engage with the founders or CEOs to understand their views on 'failing safely' and allowing space for learning through improvement.

#### 'Design Thinking Light'

I explore this section and the next on performance consulting under the banners of 'light' for two reasons. One, I know that as absolute concepts, they could be in conflict with each other, and two, since participants classified them as important but not pivotal elements in their approaches and strategy. I believe they have a place in the L&D toolkit for accelerating organisations in the right balance, which is what I explore in this section.

In their 2020 book, *Design Thinking for Training and Development: Creating Learning Journeys That Get Results*, Boller and Fletcher explain how stakeholders often blame performance gaps on a lack of skills, and turn to training as a 'quick fix' to address multi-faceted underlying causes. By leveraging design thinking, leaders are encouraged to think about the obstacles to performance and help co-design a solution.

Another important observation the authors make is how learning is viewed as an event or an intervention – like a course or e-learning or programme – when it is actually a journey. When taking part in events and courses,



people are typically removed from the context of application of learning, as mentioned in the literature review when I described the method of loci. When this happens, the authors say and I concur, people forget what they learned since application isn't part of the journey.

Design thinking allows for the creativity of the collective to come up with options that solve problems that directly impact business outcome. It ties in with systems thinking, curiosity, experimentation and experiential learning – all recurrent themes of this research, as echoed by P29:

*Our guys were on this design curiosity that created a network effect with a group of people virtually, and they learned through trial and error. That to me is learning. They are different forms of learning.*

All five stages of the design thinking process can be used to understand the business or performance problem and its context. However, an important characteristic of the ideation phase is the creativity – to problem-solve, come up with innovative ideas and think outside the box. The concept of focus groups is not new in the practice of human resources. It is rarer to be used by L&D, because focus groups are a means to an end – an opportunity to brainstorm and creatively address an issue. It is not a solution – and L&D is traditionally focused on offering a solution. The assumption that a business problem is a skill problem that can be addressed with a training solution is the first fallacy to dismantle in L&D for organisations both current and accelerating. T48 says this:



*I think it's [about] encouraging people to try things that they might not have otherwise tried. [...] There's almost like a permission on the rest of the business to say, 'There's no playbook here. Let's just see if this works'. And if it doesn't, there [are] not massive ramifications. [...] It's happening at pace, so it has almost forced the digital agenda and has forced L&D to become a bit more agile and possibly a bit more creative.*

The following quote links the motivation theory as described by Pink (2011) with strategies to develop the creativity, innovation and ideation of individuals within the organisation. T30 concurred on the three intrinsic elements to motivation at work: autonomy, mastery and purpose. Relating this back to learning and creative problem solving, Pink speaks of purpose in terms of joining a cause that is larger than yourself – one that drives the deepest motivation possible to tackle even the most complex problems. Including the individual or team as part of the wider creative business problem-solving context would be hugely motivating for employees and have benefits beyond learning by inspiring belonging and inclusion in the firm's success. As T30 states:

*You give them autonomy and mastery. This is coming from Dan Pink's Drive, which is related to self-determination theory. Then we start recognising we need support for interacting, getting those critical interactions, the creative friction where new ideas come from and also giving people time to reflect and think about their own work.*



Leaders constantly emphasised the importance of creating learning to address individual and business performance by using performance consulting principles to inform instructional design.

The idea of performance consulting is explored extensively in the literature review, quoting authors cited by interviewees such as Robinson and Robinson (C67) and Guy Wallace (T59). My reason for limiting the emphasis on performance consulting is, when it pertains to learning, it seems to assume an intervention to improve business or individual performance. Even Thomas Gilbert, whose BEM model I have quoted in my literature review, speaks of performance consulting as an intervention to solve a performance problem. I wonder if this concept deals with simple systems with direct linear causality.

My worry is that most performance consulting still believes in a ‘single best answer’. For this reason, I cannot link it directly to accelerating organisations since I have doubts as to whether it deals with extensive complexity or recognises the high flexibility and adaptability within constantly changing organisations. That said, I recognise its importance in connecting learning interventions to addressing business performance since it helps measure impact.

If a learning intervention at design can incorporate performance consulting theory to establish a causality between it and improved performance on an individual or organisational level, then it needs to be flagged – even if these interventions sit in the left quadrants of the Coomey and Stephenson



model. For example, if following Robinson and Robinson's five-step process of defining the business opportunity or challenge; analysing current performance levels; designing a solution that addresses underlying performance issues in line with organisational objectives; developing and rolling out the solution; evaluating the results; and reiteratively monitoring and improving the solution – can boost sales figures or utilisation targets – then it has relevance in all organisations. The fundamental question is whether accelerating firms have the time, appetite and structures to enable this process – and its potential advantages over a design thinking or constructivist approach.

I have included a few quotes from leaders who discussed performance consulting. They mainly follow the same premise and dichotomy expressed in this section.

*[...] Efficiencies are definitely going to drive a lot of decisions. I do think that there are L&D departments that are just going to really see their budgets get cut. It will not be a bad thing. The ones that aren't able to show value and [are] just taking orders from the stakeholders without any rhyme or reason. No performance consulting is happening; they're not connected to business strategy at all and not able to demonstrate any sort of real improvement in people's development [...]*

*And then definitely another gap that is everywhere is around the data. The data and the performance consulting and 'where's the*



*evidence of need', right? How am I demonstrating value and impact? – T12*

*They wanted to talk to him about solving business performance problems and how L&D was going to step in, understand what those were and come up with a solution that addressed them, and I think this is exposing some of our weaknesses as an industry. We need to design performance support and embedded learning first and pivot on that problem from a performance perspective in a very short time, skill up the organisation that needed to step in these new roles. That's very, very different than throwing a class, [...] a course [...] or e-learning at it. – T22*

*Our opposition was demonstrating the impact is impossible if L&D fails to realise service from a learning to a business paradigm. So, you have to move from the learning paradigm into the business paradigm. Stop thinking about knowledge, deficits and thinking about performance and business problems. Stop thinking about learning, analysis, thinking about performance of business, and so on and so forth. – T28*

T30 and T32 suggests a performance consulting approach ahead of even informal learning. And this is where, if realised, the wider connection of performance consulting relates to accelerating organisations. T32 makes the distinction between performance consulting and training needs analysis in this way:



*We should [do] as little as we possibly can to move the needle, but engaging in dialogue with the people, experimenting to see whether, without speaking to everybody, we can make a difference by plugging in those performance products according to your capability gaps and then scaling what works using smart digital resources, integrated with the tools people use for work. Guiding and supporting them [...] when they need the actual support, [which is] wrapped around with conversations because it's not a delivery play, it's a dialogue play. Gaining user insights but always being laser-focused on the results that we are trying to get. So, that for me is evidence-based practice – which is simply understanding that the main actors who are responsible for that performance, what is it that they are experiencing and what is getting in the way of them efficiently being able to perform to get the results and do things in a way that is expected or rewarded within the organisation. That is the foundation of good learning and development. – T32*

*You really should be doing performance consulting upfront. [...] If you're starting with people up here, a course may not be the right solution. When you start moving from making sure performance is optimal to also supporting the innovation and creativity that keeps the organisation relevant, you suddenly move from an irrelevant appendix to as fundamental to the success of your*



*organisation as finance and IT. And then you have a reason to exist. – T30*

I appreciate the introduction and evolution of performance consulting approaches to addressing a business need. I agree that starting with the performance outcome and exploring the possibility of informal learning or collaborative/creative problem-solving to support learning. I note that at every point, it comes across as remedial – as Thomas Gilbert originally described it (Gilbert, 1978).

#### Learning Impact

This is a frequently discussed but, in my experience, badly addressed area in organisations. As organisations constantly evolve, they must consider that traditional methods of learning efficacy will be made redundant, at least in part, as learning will not be confined to organised interventions. I question whether learning outcomes could be measured at all, and contend that if outcomes are not self-evident, the responsibility for measuring them may not necessarily sit within the L&D function.

The first observation is that vendors and learning leaders are still strongly inclined to measure the hours spent learning content on the learning system and hours spent in delivered learning. Among my interviews of L&D leaders in highly regulated industries, some said they were required to report this data. For others, at the very least, it justified the expenditure in these systems by proving they are used.

The leaders I spoke with instinctively knew that no direct correlation exists between content consumption and business impact, yet recognised the



need to somehow correlate learning to business outcomes. For L69, this was relating learning hours to a reduced attrition rate after calculating that employees who had left the firm had consumed lesser training than those who stayed. Whilst this metric could have derived from lower engagement from those intending to leave a firm who most likely would not place a priority on learning, it was nevertheless communicated to leadership. T48 puts it down to expediency. They say that only about 15% of the L&D people in their circle even attempt to prove the impact of what they do because of the challenge it poses and most don't even try. Both T48 and T12 concur that it is much easier to report on completion rates.

*ATD did a study and they showed that 94% of organisations were doing Level 1 measurement (Kirkpatrick), seeing that people liked the experience or thought it was effective. They were optimistic and say they thought it was effective. They were measuring that. But that has, according to research, about zero correlation with whether it actually has an impact. We're not measuring it. We believe it's good. If we built it, if we followed the ADDIE process and talk to our SMEs and [took] everything that they've told us that needs to be in there and we've crammed it in there, it's good. And that's wrong on so many ways – T30*

There are also leaders who collect case studies or success stories by going to the business and asking about the value of the intervention and if it has had impact on performance and business results. Although I'm not sure if the business or L&D consider any environmental factors when determining



success, it is customer feedback, which is always valuable. For sheer bandwidth reasons, it is not an exercise that is always feasible for every L&D learning intervention.

*[...] A lot of our measurements is anecdotal, success stories. I look at whether the business adopted a concept or told me something was useful. Those things are statements of value that the businesses find this valuable, and I don't have to really go prove that what I spent had a return. – L16*

The need for L&D to tie what they do in with business results is logical. If L&D's reason for being is to drive business performance and value, then it is imperative that these connect. But how does L&D ensure this connection? T28 says that traditional methods, including those discussed in my literature review, are not the answer:

*What Don Kirkpatrick and Jack Phillips [...] were trying to do is impossible. They're trying to measure learning value, and then there's an attempt to transfer that into business value. And it's absolutely impossible. It'll be to do with people completing tasks and being able to measure the impact of those tasks that have been completed. And I think that's a major, major problem that L&D has in that it's still trying to convert learning value into business value. It's the Holy Grail. – T28*

But learning leaders are striving to make that connection, and in my opinion, they should. Directly or indirectly, there must be a way to isolate the impact of specific interventions on business outcomes and measure and



report them – preferably using metrics the business understands. L&D should also be honest on interventions whose impact cannot be measured but are ‘nice to have’ in their portfolio of offerings. L&D needs to rethink how it defines and communicates ‘value’ by finding ways to report on innovation, collaboration and knowledge that has been cocreated.

*What are the skills and techniques necessary, that once I build up the framework and the eco-system, [allow] people to learn? [...] How do I know that they're actually doing that right? I really think that L&D people have been adamant that we have to put our neck on the line around commercial results. And we affect that indirectly.*

*You have to hold yourself to account to commercial outcomes in the organisation or to business objectives. Like a new systems implementation: how quickly people could get skilled up in terms of using the new technology, how quick[ly] would the number of errors drop after implementation [...]. Those are the easy ones. But when it comes to increases in revenue or increases in profit margin, increases in terms of customer experience or customer satisfaction, those are all going to be quite indirect from a training perspective.*

*But I still think we have to hold ourselves to account to achieve those. [...] I think that's why you see that merging of OD and L&D capability and all those other things because a training person*



*quickly realises [...] the hard way that a training intervention is not going to achieve that on its own. – L31*

The moment we start looking through the systemic lens, it doesn't matter which evaluation methodology we use – it gets harder to put a value on the learning contribution versus the other factors at play.

An idea that carried forward regarding the capabilities of a learning leader is the interconnectedness of L&D with other people functions. In this sense, L&D understands that the metrics need to be connected to wider talent processes or corporate culture.

*I don't know if L&D, R&R or ROI investment can ever have a model to quantify the impact on culture through shared experiences. How do you put a price on that? Has to be just a belief that this isn't about for every 100 bucks spent, I'm going to get a return of 1.5? Sometimes it just has to be a gut check of 'This is how human beings work and they want to talk to each other, and they want to share ideas' [...] We don't know how to put a premium on that. – P29*

The learning leaders interviewed also pointed to the importance and difficulty of relating learning to behaviour change and knowledge transfer:

*I don't necessarily want to be a data-driven learning organisation; I want to be a data-informed learning organisation. I think there's a significant difference with that. I think we also have to understand that behaviour change and transfer of knowledge is probably one of the most difficult things that can go on in an*



*organisation. And there are some aspects of it that are not that easily measurable – L23*

For informal learning, all of my interviewees acknowledged that those connections are harder to make – and still, they measure. It was difficult to determine the purpose of measuring what could actually be quantified, and I saw no reason why leadership in accelerating organisations would want the level of consumption and hours of training reported. In my opinion, every learning intervention entails an opportunity cost by taking people away from the regular flow of work. T59 was quite brutal on why they believe L&D seek by any means possible to measure the impact of learning in organisations:

*I think we're positioning ourselves to just continue to perpetuate our jobs. I think if people enjoy the experience, as long as there's money in the business, then there'll be a learning function because it pleases the board of directors [...] Enough HR research has shown that employees like training as a benefit. I think people like training because it's entertainment, not because they learn anything. The fact that training needs to be fun [...] is one of the most basic fundamental misunderstandings of how we learn. So, we have a tremendous number of difficulties in how we view ourselves.*

T61 was similarly forthright:

*What we're doing is content dumping because we know how that transaction works [...] there's some content in a book or a policy*



*or whatever. And we take it and we use our instructional design wizardry to translate it into a face-to-face course where somebody has some PowerPoints. Or we put those PowerPoints in e-learning, which is cheaper and nobody really works. But that's the big dirty secret of learning – we're all very shy about level-three and level-four evaluations, [...] and we just measure consumption and completion and so on. Because we kind of know it doesn't make a difference.*

I found this theme extremely frustrating to get to grips with. It had one of the highest numbers of codes and quotes, but I couldn't narrow down a framework, process or set of recommendations for make a relevant connection to accelerating organisations. For me, the fundamental question is 'Can a learning intervention be directly attributed to business performance and could business performance conversely be attributed to the learning intervention?'. And whilst several thought leaders proffered solutions and methodologies to measure business impact, the overall interconnectedness of the organisation system raises the question of the viability of isolating a single vehicle and measuring its impact. L45 shared this insight on assessing the learning impact:

*One of the things that we're trying to do as talent management [is] kind of that integrated equation, down [to the] culture that we want to build. And the way that I see it is 'What are the vehicles?'. Learning is [...] only a vehicle. There are other vehicles [...] to shape or alter, so the first question we need to ask is 'How*



*much is the alignment around those?’ It’s a very simple equation before we start with some of the learning metrics. It’s how learning is aligned to performance management to talent acquisition to the other talent management ecosystems.*

Moving into the performance consulting space, if interventions are created to solve a problem or address an underlying business issue, then upfront, ahead of design, measures should be put in place to ensure the organisation knows the issues have been overcome on completion. Programmes on sales, compliance, onboarding or how to use a machine or technology, can integrate such measures.

I did not set out to do a comparative assessment of the models covered in the literature review. What is clear is that they all assess interventions that sit in the left quadrants of the Coomey and Stephenson model – which is not where most knowledge is produced in the start-up and scale-up phases of an accelerating organisation. In my view, the ability to measure impact still falls into the L&D leader’s tool kit, with the understanding of the context within which it can be used.

#### [Conclusion: The Future of Learning in Accelerating Organisations](#)

I had initially aimed to create a handbook of recommendations for L&D leaders on their role in developing people in technology accelerating firms. The results of my findings enabled me to create a framework of skills, characteristics and ideas that leaders can leverage to establish the role and remit of L&D in these organisations. My study never set out to be



prescriptive and it isn't – especially on an organisational structure for the learning team.

Based on the learnings detailed in the previous sections, I have created a framework for L&D in hypergrowth tech-driven firms. As I explore the anatomy of learning leaders and functions, I use it as a guide and reference to build upon. Some overall thoughts:

- Without the skills below, there is no need for a dedicated learning function in an accelerating organisation. Anyone can buy tech, anyone can hire training companies, anyone can buy content, anyone can measure their consumption. It's time to start thinking about what our USP (unique selling point) is to the businesses of tomorrow.
- A learning function should support continuous growth, creativity and individual and professional development. The goalposts will continuously move as the organisation evolves and expands.
- Beyond onboarding and compliance as examples of directive learning, L&D should focus on the framework that facilitates knowledge co-creation and experiential learning.
- Both businesses and people leaders will and should start questioning the value of a dedicated learning function in a firm – and the skills and approach to learning of potential L&D leaders.
- I did not conclude with a 'yes' or 'no' answer as to whether accelerating organisations should have a dedicated L&D leader or function. I contend and recommend that, should they choose to, the skills and values detailed below can serve as a useful guide.



- I had incorporated questions around geographical differences as I spoke with leaders around the world. Despite regulatory differences and cultural nuances across different geographies, the fundamental premises in my findings were region-agnostic and applicable to accelerating tech organisations everywhere.

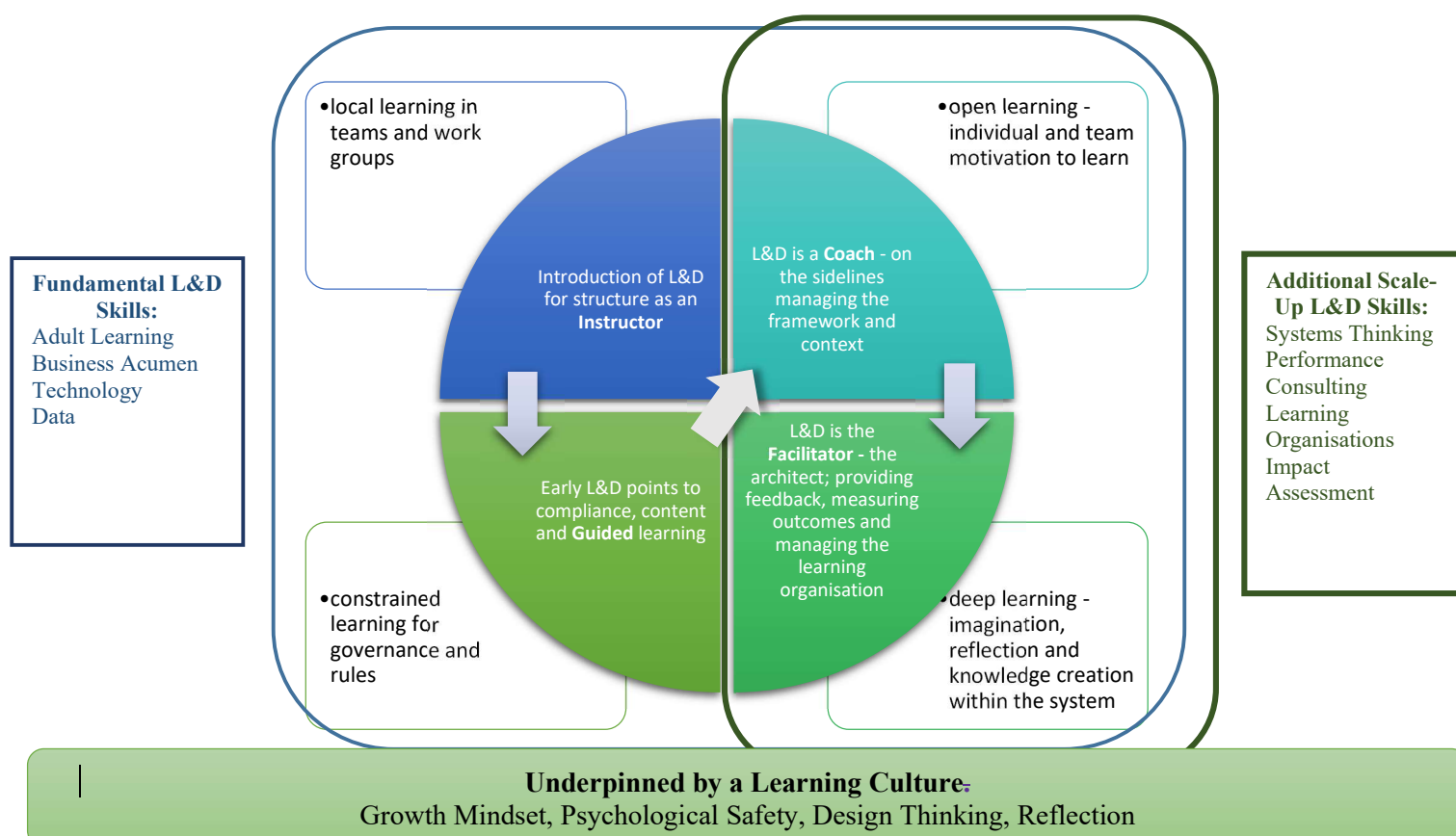


Figure 73: A Framework for Learning in Accelerating Organisations

### The Anatomy of a Learning Leader

In the absence of mandatory qualifications or a uniform set of requisite skills, I have created a listed of essential L&D skills in the context of my research questions and organisation. As a caveat, my focus is on strategic L&D leadership, not its supplementary roles and associated skills. At the



leadership level, the skills needed are multiple and non-linear – and organisations are increasingly recognising the value of a more strategic partner in L&D.

In LinkedIn Learning's 2022 Workplace Learning Report, 72% of respondents said L&D had become a more strategic function in their organisation, and 62% agreed that L&D is focused on rebuilding or reshaping their organisation. In terms of the L&D skillset, RedThread Research cited these competencies as the most critical:

- Leadership both in and outside the L&D function
- L&D core, development employees' capabilities
- Business core, operating with a firm grasp and alignment with overall business strategy
- Data and decision-making, leveraging data to make better decisions
- Managing relationships, both internal and external to the L&D function
- Personal readiness, help people and functions effectively adapt to environments in flux
- Knowledge of technology to upskill the workforce

I use my framework to explain the aforementioned skills as they relate to accelerating organisations:



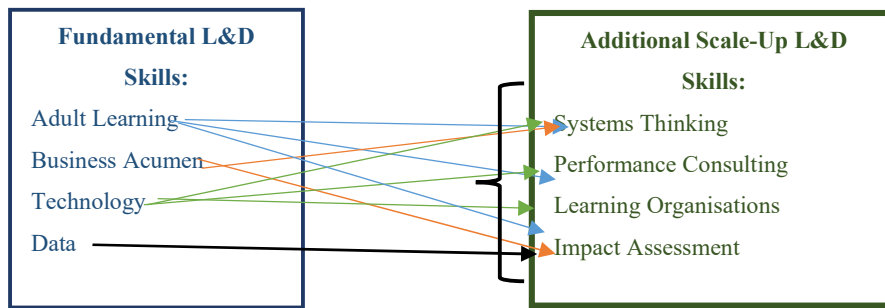


Figure 74: L&D Leader Skills

The fundamental and non-negotiable skills for every L&D practitioner are in the left box. These are how they interconnect:

- **Adult Learning:** Appreciating that this is a vast area of study and that most L&D professionals do not have a base degree in education, I use two main areas in my primary definition of learning in my literature review: understanding the fundamentals of directive or instructive learning versus constructive and systems-based learning. In accelerating organisations, this connects to the understanding of **systems thinking** versus a more **performance consulting approach**. It enables the creation of a learning culture and the facilitation of a **learning organisation**.
- **Business Acumen:** In start-up, scale-up and hyper-growth firms, understanding the commercials and strategy of the founder and leadership is paramount to contributing to an organisation's growth. It is more than alignment with business strategy: it is the understanding of the products, services and anatomy of the workforce. It is the ability to grasp the context of the industry and



marketplace to appreciate how the **systems connect**, how knowledge is built and how **impact can be assessed**.

- **Technology:** I have delved into the various technologies and platforms for creating, hosting and tracking learning interventions, as well as those that facilitate collaboration, design thinking and creativity. Technology is an enabler for all the skills of the new learning leader, in addition to the product, service and accelerating organisation. With more and more companies using artificial intelligence to provide responses to skills queries, harness knowledge and prescribe learning interventions, technology can be an important catalyst for organisational learning.
- **Data:** With complicated systems powered by increasingly advanced technology, the ability to recognise and interpret the data to improve systems and frameworks is increasingly important. Business systems like PowerBI or Tableau are able to generate business intelligence on systems performance and ascertain where learning can support it.

In an article in *Training Zone*, Martinelli (2020) recommends a mix of both traditional L&D and business metrics that learning functions can leverage to facilitate decision making:

- 'Employee retention metrics: to determine efficiencies of an onboarding programme for example.
- Productivity metrics: changes to levels of productivity from before and after an intervention.



- Incident records: for example, for health and safety (H&S) training. Measuring the number of related incidents before and after the course.
- Customer satisfaction scores (for example a CSAT score): comparing a log of customer service enquiries and an overall CSAT score from before and after staff training can show a direct and positive effect.
- Observation data: to show if there is a noticeable behavioural shift amongst employees after completing training.
- Learner satisfaction data: interviews, surveys or Q&As about the learning experience to identify where there is room for improvement.
- Before and after assessment scores: an assessment before training and then repeating the same test post event.'

The field of data science and analytics holds tremendous potential for decision makers across the organisation. In the L&D function, understanding how it can leverage this field to boost its impact is critical in accelerating organisations, where speed is of the essence.

In parallel, I have illustrated how a wider understanding of HR practices, especially in talent management – performance management, talent acquisition and workforce planning, for instance – can (and in my recommendation, *must*) be consolidated into a single role. If these roles are separated, L&D must work collaboratively with those who own those processes.



This list of skills is not exhaustive by any means. There are considerations around stakeholder management, situational leadership and team building, which is why I have concentrated on those fundamental to L&D in the context of accelerating firms.

#### The Anatomy of a Learning Function

Based on my findings, it is clear there is no precise time when L&D expands to become a function or extends beyond a pure people development role. From the skills woven throughout this chapter, the responses received and how I structured my firm's learning function following my research, accelerating organisations should consider the following roles:

- **Talent management lead** in lieu of a learning leader. This role is responsible for the directive – instructor and facilitator – role, as well as broader aspects of performance management, high-potential development, workforce planning and succession management. As companies move toward a more frameworked model of people learning, collaborating and moving within organisations, this role appreciates the employee journey and how L&D supports and enables it.
- **Community manager:** T12 describes this role as managers who oversee a community of functions or skills within an organisation as opposed to curriculums, ensuring a framework where people can learn, collaborate and create knowledge within a particular skillset or



function. They address skills and development needs, as well as performance and outcome data to the talent and operations lead.

- **Operational lead:** This role connects the business to the framework of the technology and learning organisation, with a strong grasp of platforms and systems, commerciality and business performance. This person operationalises the people strategy through a business lens.

Other commonly mentioned roles include learning curator, social or digital media content writer, marketing co-ordinator and data analyst. I stop short of a deep analysis of these new and emerging roles in L&D, and refrain from a prescriptive set of roles for the function. I believe that, in an ever-changing and heavily nuanced work environment, the definition of the skills of a coach and facilitator are more important than naming specific job titles of those responsible in the framework.

#### [Areas for Further Research and Discussion](#)

The sheer amount of data means there are always decisions to be made on how codes became themes, which in turn formed the basis of my findings. My coding system was robust and connected me to resources to analyse and interpret the data in keeping with my aims, yet data reduction meant prioritising the research evidence according to these emerging orders of interpretation.

My hope is that research participants find themselves reflected in my conclusions. In some cases, themes emerged that require further research and investigation. I detail these below:



Every learning leader chronicled their journey to both learning and leadership. No two leaders followed the same path. As discussed in the section 'L&D Capabilities', nothing led me to believe that one path was more successful than the other. Whilst I had enough to discuss the skills and capabilities of a learning leader in the context of hyper-growth and accelerating firms, I do not delve into the paths to get there. I believe that an in-depth study is needed into the various formal and certification routes. Organisations like the ATD and LPI have created capability frameworks for L&D individuals and teams but these are not mandated or used uniformly. Both L23 and T59 spoke of university degrees in instructional design but neither expressed them as a mandatory requirement for designing learning content in firms. T62 mentioned a doctoral programme for chief learning officers and expressed surprised at how little senior learning leaders knew about adult learning principles. Finally, T22 presented a different angle and contradiction:

*I haven't seen that change over the last 20 years. I haven't seen any development. I think that we're still locked in. It may be the fact that we all go through school, college or university. If we can't separate learning from schooling, we think of learning as being schooled – a formal, structured, designed-by-someone-else and delivered to me. If we can't separate ideas about learning and performance from that, we're really boxed into a corner.*



If formal qualifications are mandated for L&D, is there a danger these would perpetuate or reinforce the assumption that this is also how organisations learn? Or would they do as they are taught, not how they are taught? These considerations require more detailed research and exploration.

#### Leadership Development

Leadership development is a field of study in itself. The role of the founder has been discussed in this chapter. How to develop the leadership team as it expands and which specific skills need development require further exploration in the context of new organisations. As Petrie (2011) observes, the nature of challenges that managers face are changing rapidly, yet the methods used to develop them have not evolved. In his words, 'The incremental improvements that we were making in programs were what Chris Argyris would call "single loop" learning (adjustments to the existing techniques), rather than "double loop" learning (changes to the assumptions and thinking upon which the programs were built)' (Petrie, 2011).

Conversely, with regard to the efficacy of leadership programmes, L23 spoke of the difficulty in justifying, accurately measuring and connecting them to business outcomes:

*[...] When it comes to training, any kind of human behaviour change, there's a little bit of fuzzy math around that because you think you have the answers, but you may not. You may not know exactly what's going to happen. A lot of this is in the leadership development space. It's hard to tell the story ahead of time. I*



*think that's the fundamental flaw of what's going on in learning is the executives that make the funding decisions probably aren't being told the story in a way that's backed by research, science [and] data. [...] Your learning team has to understand what are the realities of transfer of knowledge and behaviour change that we can affect, because there's a lot of dynamics and variables that we know happens, but we don't know a lot about them, and so we're not sure. So, I think that's part of the challenge, how you bring that forward to build the business case for that further investment.*

Some interviewees oversaw leadership development, some firms had it as a separate function. All of these programmes were live and instructor-led, and in some cases included additional support like external coaching. The definition of 'leader' varied – from people manager to C-suite – but the interventions remained more on the left quadrants of the model. Everyone who discussed leadership development mentioned the difficulty of measurement. T59 shared the table below. With the large amount of spend in the area, it needs further study in design and measurement of impact and efficacy, especially in the context of the firms of the future.



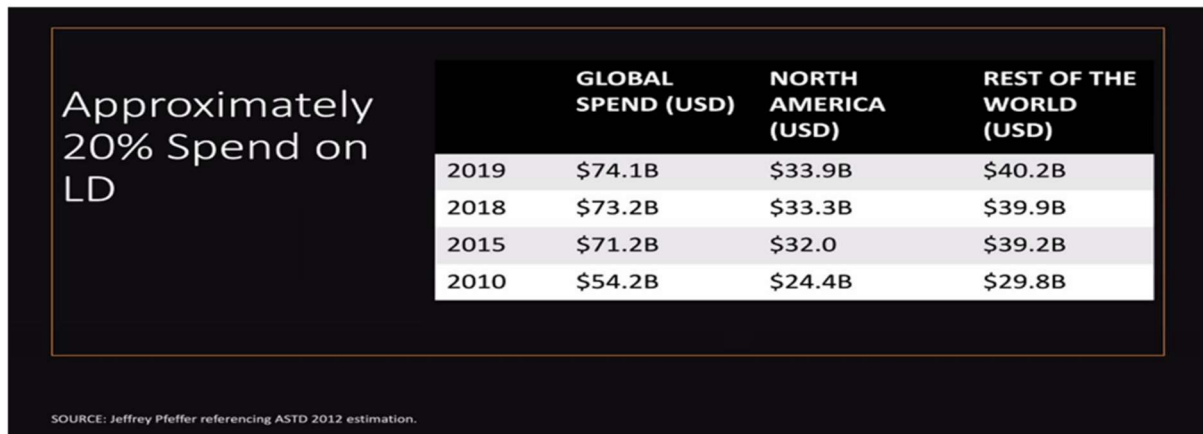


Figure 75: Annual Spend by Firms on Leadership Training

### Instructional Design

Two broad areas instructional design were discussed in the interviews. The first is 'how we build learning' using sound adult learning principles and evidence-based learning design. The second was around the technologies used to build, host and share them with the organisation.

This is a huge area in L&D – the creation of learning artefacts in all its forms. With the advancements in the field of educational technologies, there are multiple platforms to create and disseminate learning. In their 2020 paper, Hernandez-de-Menendez, Escobar Díaz and Morales-Menendez highlight several emerging technologies that can help bolster creativity, analytical and critical thinking, problem-solving and innovative thinking, all essential for accelerating organisations. These include virtual and augmented reality, 3D printing, drones, IoT, robots, AI, holograms, wearable devices, virtual laboratories and blockchain.

My interaction with instructional design has been minimal in this study. Instead, I have focused on learning at the strategic level in an accelerating organisation – the timing of the function's introduction of the function, its



remit and the essential skillset for learning leaders. As we delve into the offerings and their position in the left quadrants, I believe additional study will be needed in the new context.

#### Engagement and Experience

A final area to explore further is how to engage employees and better connect them with learning content and interventions. In my literature review, referencing Clark, it is possibly a matter of debate whether greater engagement with the learning content leads to greater knowledge retention, application, behavioural change and performance change for the organisation. To me, it is better for employees to engage with content presented in a compelling way than to ignore it because it is not compelling or because they don't know it exists.

A new 'marketing for learning' area is currently gaining traction in the L&D space, led by industry leaders like MAAS Marketing and thought leader Bianca Baumann. As MAAS shares, 'Rather than getting you to invest in even more tech and content to solve a problem, marketing helps you address the core issue: learner engagement. Marketing and communications help you to raise awareness of learning experiences in your organisation and ensure that your people take the time to learn'. Meanwhile, Baumann's *Little Black Book of Marketing and L&D* aims to help L&D functions boost their impact by applying core marketing such as marketing funnels, the marketing mix, learner personas, content strategy and 'create learning experiences that stick' (Baumann, 2019: 3).



Whilst I completely agree with the use of marketing and social media principles for greater learner engagement, this area needs additional exploration in a constructivist framework. One could – and should – debate the need for custom content at all, which is why this area requires further research.

Going back to the previous observation, technology has strongly enhanced learner engagement. If used right, it can be invaluable for experiential learning such as the simulated flying of an aircraft, a surgery performed in virtual reality or a drug tested in augmented reality. In areas like biotech –which in every way would reflect characteristics of accelerating organisations – there is a fine line between the creation of frameworks that allow for free experimentation and ensuring that learning is both ethically and regulatory directive. This needs further discussion and research since these fields and how people learn within them are in their infancy.

## Conclusion

The concept of accelerating organisations and how learning frameworks operate within them is still fairly new. Learning leaders need to consider how humans learn and develop in the context of business performance in environments that are constantly evolving, and business priorities that are constantly changing. I see my research as a starting point, a menu to navigate through the unknown, by better preparing L&D leaders based on what is currently known.



The notion of a person or function knowing the exact learning needs of a firm and its employees at any given is perhaps a fallacy. The provision of systems that facilitate the development and sharing of knowledge is perhaps far more important than the provision of content. And despite centuries of adult learning theory, there remains much to learn about the current world context and how organisations support their employees to adapt and thrive within it.



## 7. Implications

According to the British government's Companies House data, the UK registered 46,474 new tech-driven firms in 2022, denoting a marked 22% uptick over the previous year. The number of new incorporations nearly doubles the 23,531 tech companies added in 2020. Meanwhile, the U.S. tech industry recorded highest number of tech start-ups in 2022, with forecasts of \$1.8 trillion in market value by the year's end (Flynn, 2023).

The tech industry is plainly accelerating at a rapid rate, yet according to Data Sage, over 90% of start-ups will fold every year. Whilst employees typically aren't typically cited as the leading reason behind these failures, *Harvard Business Review* aptly recognises that the most successful organisations are led by business leaders and employees who are flexible, adaptable and capable of acquiring new skills through a growth mindset (Chopra-McGowan, 2019). This is where the outputs and implications for this research are so important.

### Implications for Self

At the time of writing, I have spent over 20 years in corporate learning and development. Whether serving as a management consultant or as a global head of talent, my career has predominantly transpired in the technology space. Immersed in this world, I initially wondered how my L&D community of practice would react to my decision to question our roles, remit, structure and offering. Throughout this process and the evangelising of my findings, I have had questions and discussions, but never reactions of opposition or



fear. I wondered if my research would limit my career prospects or undermine my opportunities with potential collaborators. That has also not come to pass.

Inherently, our field requires additional research, especially studies by practitioners who 'walk the walk' by working on the ground and living the field. I have expanded my horizons on the learning and talent professional I aspire to become, and how I can add value to the firms I work with. But it did mean questioning the fundamental principles of why L&D existed in organisations.

In many ways, I bought into the current logic of why L&D exists in firms: employees need to develop their skills and require learning interventions to acquire them, therefore, they require learning content or courses. To a learning leader, this makes adequate sense, and helps define the learning function's *raison d'être*. We don't question whether the underlying logic is flawed, or narrow – we focus on how learning interventions can increase efficiency and effectiveness, which is evaluated in ways we define and measure. Meanwhile, I watch organisations like mine, operating in a constantly changing world of new technology, new markets, and new operating models. To be successful companies need to be agile in both their business models, and their ability to promote rapid capability building in their offerings and their employees, so they can survive and thrive. To all these internal and external pressure and disruptions, L&D's answer cannot only continue to be courses or content, no matter how soundly this is



designed. The objective has to be to build a culture and environment that allows for experimentation, for seeking out ways to gain understanding, and for knowing that this is supported by the organisational frameworks and leadership buy-in. Our role is to develop the same future-focus that the new workforce in new organisations have, and with business success in mind, build processes that could swiftly implement this overarching objective across the organisation.

During my research, I have moved from knowing instinctively that change was needed to being able to clearly articulate my core concerns and observations. Despite calls for the L&D function to play a greater role in corporate strategy and exert a more valuable and measurable contribution to organisational performance, research by Garavan et al. (2020) notes that progress has been relatively modest, as L&D has 'struggled to disentangle its operational remit and transform its focus and activities'. Among their conclusions, the authors underscore the ongoing perception of the L&D profession as operational, tactical and administrative, and call for further 'longitudinal investigations' that consider time, context and categories of organisations. Through my research, I hope to form part of this next step by contributing to a deeper analysis of my profession.

Harkening back to Ackoff's model, as I reached the end of transcribing my data, I gathered information, formulated industry knowledge within the context of my research, and transformed it into wisdom to establish my positionality. After this point, I began to evangelise what I knew. It started small with my circle of interview subjects, many of whom invited me to



share my findings with their accelerating organisations. It moved to online conferences as a guest on podcasts and interviews for online platforms like LearningNow TV.

And as I shared, I learned. I posted widely on LinkedIn, which sparked greater discussion and debate in the L&D community. I had moved from a learning leader within an organisation with a defined remit to a voice in the profession with evidence-based opinions and messages, some of which are highlighted in this chapter.

#### [Application in My Organisation](#)

There is no better endorsement for one's research than its real-life application in the workplace. Over the past two years, I have created the corporate university for my organisation, grounded on the vision to source, recruit and train grassroot-level technical talent and transition them into the firm. Named 'The Academy', it seeks to serve as a bridge between education and employment by providing development whilst connected to strong business metrics, including reducing talent-pipeline costs, time to competency and attrition rates, and accelerating time to preparing client-facing employees with billable output.

Whilst my organisation is in a hyper-growth and scale-up mode, it is not a start-up, and its people function has been long since established. I do not see this as a drawback, but as a testimonial of the global applicability of certain elements of my research in tech organisations. As Watt S. Humphrey said, 'Every business is a software business', a remark paraphrased and further developed in a speech by Microsoft CEO Satya



Nadella. In his words, 'Every company is a software company. You have to start thinking and operating like a digital company. It's no longer just about procuring one solution and deploying one. It's not about one simple software solution. It's really you yourself thinking of your own future as a digital company' (Carvalho, 2018).

The Academy currently has ten learning pathways focused on experiential learning and group ideation, running 12 weeks for graduates and up to two years for apprentices. These offerings have no large course manuals, trainers or tracking of hours spent on any learning platform, and solely use evaluation methodologies which are directly tied to business metrics. We recognize the need for directive learning as all associates are at 'novice' or entry level, but we restrict this to methodology and business etiquette. Employees are encouraged to work in groups, shadow experienced staff, brainstorm solutions to existing client problems or past case studies.

During its first year of operations, the Academy had no learning management system, relying on a basic platform to host weekly learning pathways. In subsequent years, the Academy moved to the company's internal learning platform, but this was done from a consolidation and cost saving perspective, and did not impact how we reported or supported learning. The Academy team includes a learning experience designer, a facilitator/coach and three regional managers for the Americas, EMEA and Asia-Pac. In the past two years, over 400 students have been trained and transitioned into the organisation, and the Academy has broadened its physical and virtual presence to 16 countries. Because we start with the



business need and work pipeline of the specific function or region, the learning framework guides individuals to quicker efficiency. We benchmark the employee's profile before and after the learning journey, which enables connecting organisational productivity measures to the learning and iterating as the business needs evolves.

Most importantly, we never separate learning from context. Individuals recognize the 'bigger picture' and how their individual contributions impact team, project, client and firm. This approach adds greater purpose to their roles and empowers them to seek their positionality and growth in the wider organisational framework. Above all else, I believe this last point has contributed to employee retention or 'stickiness' within the organisation. Attrition rates have fallen across the board, from approximately 38% to zero in some countries. Figure 76 represents a snapshot of a learning pathway, including a legend of the various formal and informal learning techniques.

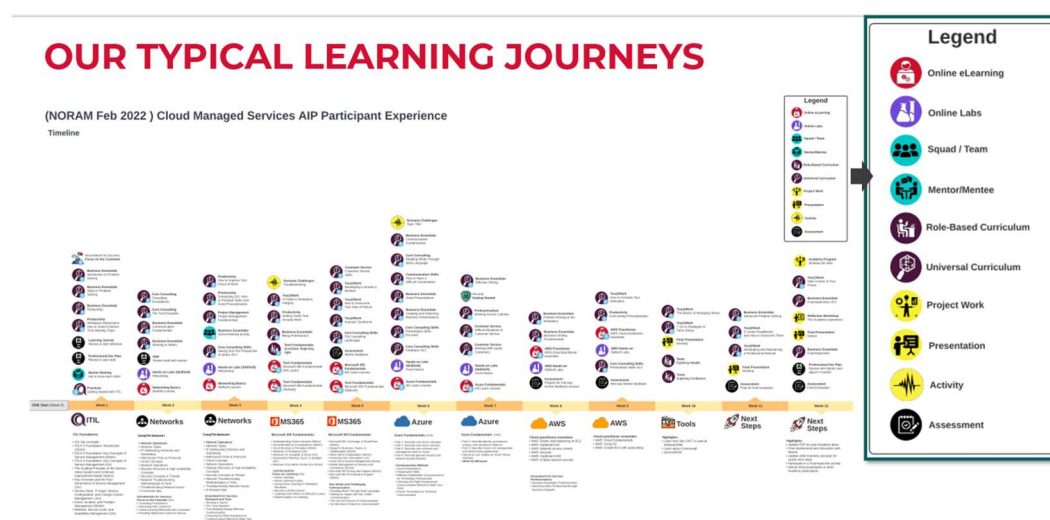


Figure 76: Academy Sample Learning Journey.



Following is a brief overview of efficacy measures as of early 2023:

#### **High level business outcomes & measures**

- Decreased time to competency – by an average of **40%** (Managed Services)
- Reduction in attrition – from **38%** in key regions to near zero (India, Brazil)
- Shorter times to billability – **30%** in 3 months, **100%** in 6 (SAP in the cloud)
- Increased efficiency and productivity – **350%** increase as compared to those hired with 1 year experience (Global NOC, GSDC)
- Calculated reduction in cost per learner – economies of scale from CHF 4.4K to CHF 2.0K
- Reduction in recruitment costs and salary costs – no agencies, no headhunting, approx. **43%** savings in salary vs 1 yr experience
- Investment in future leaders of XYZ.

*Figure 77: Key Statistics of the Academy for Business.*

My current role encompasses all of talent management, and I am keen to explore how ongoing development post-Academy can continue to relate to the inter-connectedness of organisational systems and people processes. As defined in the 'Findings' chapter, these are definitely areas for further research.

#### **Implications for Practice**

Broadly speaking, I classify the implications for the practice into the following two categories:

- Implications for L&D Leaders
- Implications for accelerating organisations

#### **Implications for L&D Leaders**

A notion that stood out strongly during my interviews was that the L&D function is and would be a luxury for accelerating firms, and its implication that it is not a strategic function for the people team nor for the overall



business. A quick look at our deliverables and we see the reason for this perception.

L&D currently puts too much focus on the operational aspects of delivering training relating primarily to compliance, regulatory, onboarding and managerial training. Learning paths that incorporate role-specific skills assume that learning artefact delivery is the sole means to achieve this, which in turn entail operational roles for content production and platform/vendor maintenance. This current state of affairs does not align with where L&D should focus most of its efforts if it aspires to ensure its long-term relevance in fast-growing tech firms.

It is difficult to gauge how many hours L&D leaders spend developing their own skills. I strongly believe that securing L&D's strategic relevance in future organisations requires raising the barriers to entry to the profession, which starts with L&D professionals currently working in the field. L&D practitioners should have a robust understanding of their organisation's context, how adults learn in corporate settings, how their learning contributes to overall business growth and concrete objectives, and L&D's critical role in creating solid frameworks to facilitate it. We will need to understand the interconnectivity among other people and talent functions, such as recruitment, performance, leadership, workforce planning and succession development. These areas nearly always sit outside the remit of L&D, but can easily absorb L&D in accelerating organisations, where there must be headcount considerations for support functions. Learning leaders



need to consider a broad spectrum of skills and offerings in the context of constantly evolving organisations in order to drive growth and promote their long-term sustainability.

#### [Implications for Accelerating Organisations](#)

The timing of when a people or talent or learning development function is introduced in accelerating organisations depends largely on the founder's vision and the chief human resources officer's strategy. This is unlikely to change and indeed it shouldn't. Basic policies need to be in place before considering the attraction, retention and development of talent. The important implication from this research is the call to view talent holistically, with their development and growth considered alongside their current profile and acquisition cost.

Critically important for the organisation, workforce and L&D strategy are looking for qualities like growth mindset in the interview process and ensuring the principles of creativity, design thinking and psychological safety form part of the organisation's environment and culture. An overall talent role that includes L&D is a consideration, but even more vital is a shared vision of what 'talent' means in the context of its acquisition, retention and development. As explored further in the section 'Areas for Further Research', all people leaders should understand the talent philosophies to define where they must place emphasis at various stages during the firm's growth, as well as the profile and skills of the individual needed to strategize and operationalize L&D initiatives.



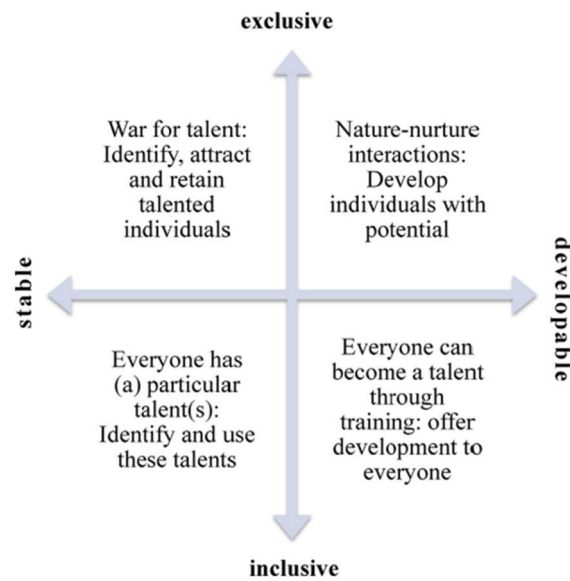


Figure 78: Talent Management Philosophies (Meyers and van Woerkom, 2014).

## Summary

A bell is not a bell till you ring it,  
A song is not a song, till you sing it.  
- Oscar Hammerstein II

There is debate on the origin of these words by this famous American lyricist, but consensus on its meaning, which is all about action and full manifestation: a bell only realises its true potential when rung, just as a song only comes alive when sung.

This quote came to mind as I considered the implications for my practice, since my thesis will remain as findings on a paper unless I share and evangelise it, and find opportunities to both put it into practice and guide others to do the same. The findings in this research have the potential to change how learning leaders view themselves in the context of accelerating organisations. It has the potential for heads of people and firms to consider



when they should introduce a development function and the remit for this function. I am uncertain if any of this will come to pass easily if I do not continue to engage with the profession and evangelise my findings.

To cement my situatedness, I volunteer at several professional learning institutes, serving on the boards of the Learning and Development Accelerator and Learning and Performance Institute, and as a member of the advisory group for the AWS Re:start programme, an initiative started by Amazon to help participants develop entry-level cloud and tech skills and connect them with potential employers. I have authored a chapter on learning analytics in Brandon Carson's book *L&D's Playbook for the Digital Age*, and been invited to speak at several conferences (see Appendix 6).

To further evangelise, I turned to social media, just as I had done to validate my problem statements and recruit research participants. The online realm is possibly been where I've had my greatest interaction and traction. In 2020, I was recognised as one of the Learning and Performance Institute's Top 10 L&D voices to follow on Twitter, and my LinkedIn posts regarding my research regularly attract thousands of views:



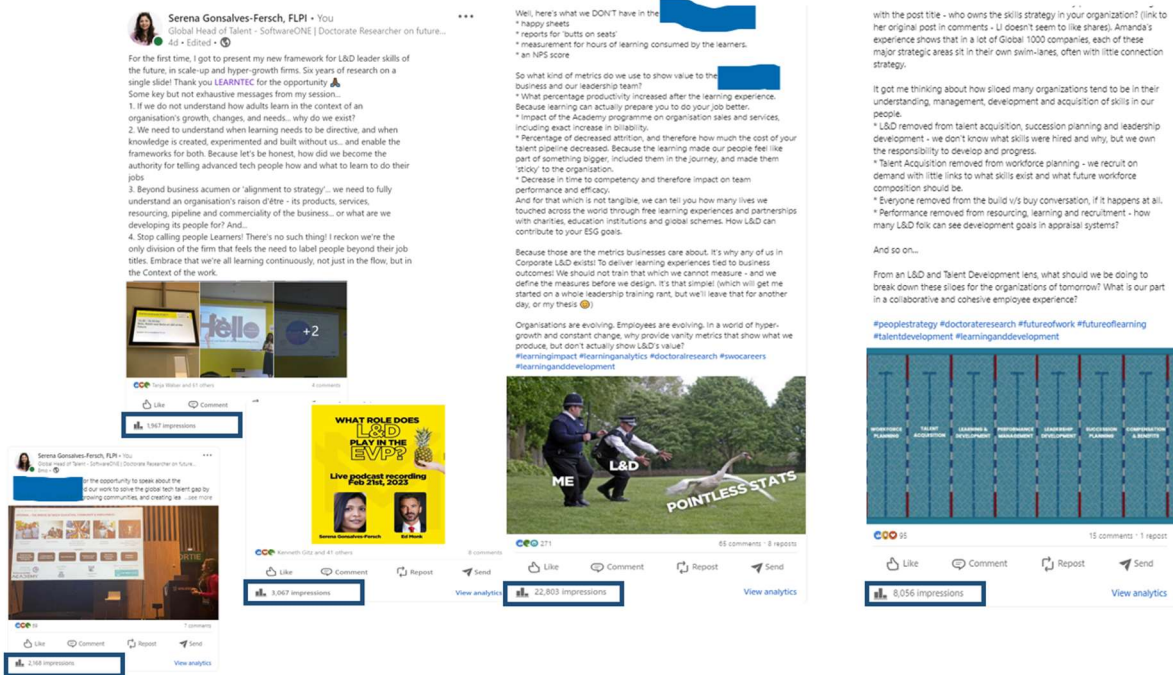


Figure 79: Samples of LinkedIn Posts.

In my view, the most critical implication of my research is its impact on the profession: it will only be relevant if discussed, leveraged and applied by other L&D leaders. For this to happen, it must be socialized and evangelised. It cannot be relegated to a shelf in a university library, nor restricted to my individual context. Whilst my academic doctoral journey might be coming to an end, I feel strongly that my professional perseverance and passion to keep our field relevant and purposeful is only just beginning.



## 8. Reflections

I cannot teach anybody anything,  
I can only make them think.

*Socrates*

The beautiful thing about learning  
is nobody can take it away from you.

*B.B. King*

It might seem odd to start a final Reflections chapter with two quotes, but these are both lessons for myself and messages for those reading my thesis.

### Beginning

I started out on this journey because I believed there was something fundamentally not working in my profession, but I wasn't sure what. I saw a disconnect between what I was being sold at every learning exhibition and trade show, and what I needed as a practitioner on the ground. It bothered me that as a function, we always seemed disconnected from where 'the real stuff' happened in organisations, and just appeared reactive to requests for courses – or reacted to requests with courses. It bothered me that there were no barriers to entry in the profession – either to work in an organization, or to create products and programmes for L&D's consumption. Budgets changed, reporting lines changed, modes of learning delivery changed, technology changed, organisations changed. And yet somehow, the L&D function endured with a relatively similar remit, in some consistent shape or form.



There were constant discussions around needing 'a seat at the table' referring to L&Ds disconnect from organizational strategy and decision-making; but my head kept saying, "how can we expect to catch different fish, we've never changed our bait! How can we expect the organization to view us differently, when we've never really changed our fundamental offering!"

Meanwhile, organisations were and are changing – to me, accelerated by technology at a faster pace than ever before in history. I didn't know how or by doing what, but I knew we in L&D had to change to keep up and to stay relevant.

The doctorate started as a way for me to have a deeper understanding of adult learning in organisations, to learn more about my profession and my situatedness in it. And to see how I could give back to a field I had spent the last two decades in, and possibly 'rescue' us from irrelevancy and obsolescence. I started with a combination of frustration and determinedness – and in many senses, I am ending feeling the same way.

### [The Revelations](#)

I had not expected the overwhelming response to my call for interviewees, both from the firm on LinkedIn and the referrals. I hadn't anticipated the frank uninhibited sharing, and the incredible generosity the interviewees demonstrated with their time and knowledge. It felt both humbling and energizing and was why the number of conversations spiraled. What also stood out was how many people agreed with the basic premise of the



research – L&D as it is, isn't quite right for the organisations of tomorrow; and we need to fix it, or we will be at best irrelevant, at worst redundant. And whilst how emphatic or extreme their opinions were differed, everyone agreed on the need for change, the need to look at organizations in different industries and the context of L&D within them differently, and the need for more research in L&D by a practitioner leader, rather than a vendor or institute.

And then came the frustration and confusion. If this many want and advocate for change, why do we in L&D keep churning out the same things? Why do we fall into the same patterns of learning artefacts and course delivery, with a repeated model of platform and content libraries? Why is there so much emphasis on individual – consumption, experience, performance – and a comparatively less on business systems and frameworks? Where is the disconnect between knowing best practice, and implementing it? Is it about having the role, remit and situatedness in an organization? Or is it because the threshold for entering the profession is so low, there are just not enough of us who 'know'? Or perhaps, the connection between industry type and business perspective, and adult learning in the context of these has not been made, or at the very least, not adequately researched and documented.

### [The Contemplations](#)

John Dewey has often been mistakenly credited as saying 'We do not learn from experience. We learn from reflecting on experience' when what he



actually said was *Active, persistent, and careful consideration of any belief or supposed form of knowledge in the light of the grounds that support it and the further conclusions to which it tends* (italics original) serves as a way to train thinking to make it a better way of thinking (Lagueux, 2021). Dewey goes beyond the words he's credited with 'experience' and 'reflecting' which according to the author makes the quote a bit spurious, and speaks of careful and persistent consideration, and application of deep thought from any way of acquiring knowledge, including experience. And this has validity both for myself as the researcher, and those who experience me sharing my findings and evangelising my research. When I reflected, considered and analysed the conversations I had, the process of transcribing, the coding and the establishment of the themes, I learned more about my field and myself, than I thought possible.

I had started out assuming that my foundational understanding of learning, the L&D profession, and our situatedness in the organisation, was sound. What we did, what we offered, and why we needed to change, I assumed was clear in my mind. I thought I was looking for answers on the 'how' and imagined an output of a handbook of dos and don'ts for the profession to work with accelerating organisations if we were to exist at all.

What I hadn't expected was a complete seesaw. From one end to the other with validation in some areas, and complete invalidation of others. From feeling quite secure in what I knew, to feeling like a complete novice to the field. From determination to do right by myself and my field, to complete



frustration at how many answers came up as 'it depends'. From one extreme end of what learning is, to another. From bricolage to balance.

Every stage of the process involved the unpicking what I had done over the course of two decades and what others had done, what I knew and what they knew, and the decisions of what I needed to build up again and what I needed to discard. To understand that the contradictions can co-exist, that my research experiences lead to thought, and thought lead to action, and action lead to change, and in all of that, I learned – that was the epiphany. That what I was contributing wasn't a binary argument, wasn't a handbook of simple rules. That implementing what I learned would be part of the evangelising that cannot stop with the publishing of a thesis.

What I am hoping to do is make our community of practice, think. Think differently about the new world of work, think of accelerating organisations, think of their growth journey, think of how employees operate and learn within them, and think about what our role is within that. Because in all that, we will learn – and that's the beautiful and lifelong thing that no one can take away.



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## Appendices

- Appendix 1 – Consent Form
- Appendix 2 – Participant Information Sheet
- Appendix 3 – Complete Coded List of Interviewees
- Appendix 4 – Sample Extracts of Transcripts
- Appendix 5 – Narrative Approach
- Appendix 6 – Example Conference Appearances
- Appendix 7 – MORE Sign-Off Confirmation
- Appendix 8 – Code Book Snippet





**Version Number 01**

Participant Identification Number:

**CONSENT FORM**

**Title of Project:** Transforming Learning for the Accelerating Organisation

**Name of Researcher:** Serena Gonsalves-Fersch

Please initial box

1. I confirm that I have read and understand the information sheet dated February 2020 for the above study and have had the opportunity to ask questions.

☒

2. I understand that my participation is voluntary and that I am free to withdraw at any time, without giving any reason and without penalty.

☒

3. I understand that my interview may be taped and subsequently transcribed.

☒

4. I agree to take part in the above study.

☒

Name of participant

Date

Signature

Name of person taking consent  
(if different from researcher)

Date

Signature

Researcher

Date

Signature






1 copy for participant; 1 copy for researcher;

Remember that a signed consent form is not required for an anonymous questionnaire, instead the following statement is recommended to be included on the survey questionnaire:

'Completion of this questionnaire is deemed to be your consent to take part in this research.'



## Appendix 2 – Participant Information Sheet

 <b>MIDDLESEX UNIVERSITY</b> <b>PARTICIPANT SHEET (PIS) – February 2020</b>		
Participant ID Code:..... <b>C67</b> .....		
<p><b>1. Study title</b> Transforming Learning for the Accelerating Organisation</p> <p><b>2. Invitation paragraph</b> You are being invited to take part in a research study. Before you decide it is important for you to understand why the research is being done and what it will involve. Please take time to read the following information carefully and discuss it with others if you wish. Ask me if there is anything that is not clear or if you would like more information. Take time to decide whether or not you wish to take part. Thank you for reading this.</p> <p><b>3. What is the purpose of the study?</b> The aims of the study are the following: 1) Identify the conditions under which the introduction of L&amp;D services or formalising an L&amp;D function can effectively drive further growth and productivity within a technology accelerating organisation. 2) Explore the capabilities likely to be needed by L&amp;D professionals operating in this environment. My ultimate aim is to be able to recommend what the role and structure of a Learning function should be to effectively enable the talent of the organisation of the future, to thrive.</p> <p><b>4. Why have I been chosen?</b> As an L&amp;D leader, or vendor, or thought leader, and therefore an influencer in this field, I would appreciate your time and expertise. My research looks at the future of learning and the learning professional in technology organisations in hyper growth. If you decide to participate, an interview would be arranged at a time and place of your convenience and would last about an hour. The data I will collect will purely be related to your opinion and insight on the subject and I am happy to reference you as you see fit. The information will be kept private and confidential if you so wish and I will not pass on your details to any organisation or company. This is a personal research for academic purposes and is not connected to any commercial organisation. I am happy to make available for review the outputs of my research – my doctoral thesis.</p> <p><b>5. Do I have to take part?</b> It is up to you to decide whether or not to take part. If you do decide to take part you will be given this information sheet to keep and be asked to sign a consent form. If you decide to take part you are still free to withdraw at any time and without giving a reason. If you do decide to withdraw from the study then please inform me, the researcher as soon as possible, and I will facilitate your withdrawal. If, for any reason, you wish to withdraw your data please contact me within a month of your participation. After this date it may not be possible to withdraw your individual data as the results may have already been published. However, as all data are anonymised, your individual data will not be identifiable in any way.</p>	<p><b>6. What will I have to do?</b> We will have a conversation. This will be a semi-structured interview. I have a few questions, but I am mainly interested in your opinions, experience, and expertise.</p> <p><b>7. Will I have to provide any bodily samples (i.e. blood/saliva/urine)?</b> No.</p> <p><b>8. What are the possible disadvantages and risks of taking part?</b> No known risk in participating in this project.</p> <p>Appropriate risk assessments for all procedures have been conducted, and will be followed throughout the duration of the study.</p> <p><b>9. What are the possible benefits of taking part?</b> I hope that participating in the study will help you. However, this cannot be guaranteed. The information I get from this study may help us to gain a better understanding of our profession and its relevance to the workforce of the future in rapidly accelerating technology organisations.</p> <p><b>9. Will my taking part in this study be kept confidential?</b> I have put a number of procedures in place to protect the confidentiality of participants. You will be allocated a participant code that will always be used to identify any data you provide. Your name or other personal details will not be associated with your data, for example, the consent form that you sign will be kept separate from your data. All paper records will be stored in a locked filing cabinet, accessible only to me and my supervisor, and all electronic data will be stored on a password protected computer. All information you provide will be treated in accordance with the UK Data Protection Act.</p> <p><b>10. What will happen to the results of the research study?</b> The results of the research study will be used as part of a Doctorate dissertation. The results may also be presented at conferences or in journal articles. However, the data will only be used by me and at no point will your personal information or data be revealed without your consent.</p> <p><b>11. Who has reviewed the study?</b> The study has received full ethical clearance from the Research ethics committee who reviewed the study.</p> <p><b>12. Contact for further information</b> If you require further information, have any questions or would like to withdraw your data then please contact: Serena Gonsalves-Fersch - SG1391@live.mdx.ac.uk Prof Brian Sutton - B.X.Sutton@mdx.ac.uk</p> <p>Thank you for taking part in this study. You should keep this participant information sheet as it contains your participant code, important information and the researcher's contact details.</p>	
 <b>Middlesex University Guide to Research Privacy Notices</b> Privacy notices need to be presented whenever data is collected and should be understandable and accessible. Privacy notices must explain the type and source of data that will be processed. They will also set out the processing purposes, data retention schedules and data sharing. Privacy notices must include details of the subject's rights and who the subject can complain to. <b>Middlesex University Privacy Notice for Research Participants</b> The General Data Protection Regulation (GDPR) protects the rights of individuals by setting out certain rules as to what organisations can and cannot do with information about people. A key element to this is the principle to process individuals' data lawfully and fairly. This means we need to provide information on how we process personal data. The University takes its obligation under the GDPR very seriously and will always ensure personal data is collected, handled, stored and shared in a secure manner. The University's Data Protection Policy can be accessed here: <a href="https://www.mdx.ac.uk/_data/assets/pdf_file/0002/471329/Data-Protection-Policy-GDPR-02-4.pdf">https://www.mdx.ac.uk/_data/assets/pdf_file/0002/471329/Data-Protection-Policy-GDPR-02-4.pdf</a> The following statements will outline what personal data we collect, how we use it and who we share it with. It will also provide guidance on your individual rights and how to make a complaint to the Information Commissioner's Office (ICO), the regulator for data protection in the UK. <b>Why are we collecting your personal data?</b> As a university we undertake research as part of our function and in our capacity as a teaching and research institution to advance education and learning. The specific purpose for data collection on this occasion is to identify the conditions under which the introduction of L&D services or formalising an L&D function can effectively drive further growth and productivity within an accelerating organisation. Then specify the set of capabilities likely to be needed by L&D professionals operating in this environment. My ultimate aim is to be able to recommend if and when a managed learning function should be introduced in technology accelerating organisations on a rapid growth trajectory, and then recommend what the role and structure of such a function should be to effectively support the organisation, and if current L&D models and methods allow for this. The legal basis for processing your personal data under GDPR on this occasion is Article 6(1a) consent of the data subject. <b>Transferring data outside Europe</b> In the majority of instances your data will be processed by Middlesex University researchers only or in collaboration with researchers at other UK or European institutions so will stay inside the EU and be protected by the requirements of the GDPR. In any instances in which your data might be used as part of a collaboration with researchers based outside the EU all the necessary safeguards that are required under the GDPR for transferring data outside of the EU will be put in place. You will be informed if this is relevant for the specific study you are a participant of. <b>Your rights under data protection</b>	 <b>Under the GDPR and the DPA you have the following rights:</b> <ul style="list-style-type: none"><li>to obtain access to, and copies of, the personal data that we hold about you;</li><li>to require that we cease processing your personal data if the processing is causing you damage or distress;</li><li>to require us to correct the personal data we hold about you if it is incorrect;</li><li>to require us to restrict our data processing activities;</li><li>to require from us the personal data we hold about you which you have provided to us, in a reasonable format specified by you, including for the purpose of you transferring that personal data to another data controller;</li><li>to object, on grounds relating to your particular situation, to any of our particular processing activities where you feel this has a disproportionate impact on your rights.</li></ul> <p>Where Personal Information is processed as part of a research project, the extent to which these rights apply varies under the GDPR and the DPA. In particular, your rights to access, change, or move your information may be limited, as we need to manage your information in specific ways in order for the research to be reliable and accurate. If you withdraw from the study, we may not be able to remove the information that we have already obtained. To safeguard your rights, we will use the minimum personally-identifiable information possible. The Participant Information Sheet will detail up to what point in the study data can be withdrawn.</p> <p>If you submit a data protection rights request to the University, you will be informed of the decision within one month. If it is considered necessary to refuse to comply with any of your data protection rights, you also have the right to complain about our decision to the UK supervisory authority for data protection, the Information Commissioner's Office.</p> <p>None of the above precludes your right to withdraw consent from participating in the research study at any time.</p> <p><b>Collecting and using personal data</b> I will need no personal data other than your name and job title.</p> <p><b>Data sharing</b> Your information will usually be kept only by the researcher conducting the project you are participating in, namely so that they can identify you as a participant and contact you about the research project.</p> <p>Responsible members of the University may also be given access to personal data used in a research project for monitoring purposes and/or to carry out an audit of the study to ensure that the research is complying with applicable regulations. Individuals from regulatory authorities (people who check that we are carrying out the study correctly) may require access to your records. All of these people have a duty to keep your information, as a research participant, strictly confidential.</p> <p>If we are working with other organisations and information is shared about you, we will inform you in the Participant Information Sheet. Information shared will be on a 'need to know' basis relative to achieving the research project's objectives, and with all appropriate safeguards in place to ensure the security of your information.</p>	 <b>Storage and security</b> The University takes a robust approach to protecting the information it holds with dedicated storage areas for research data with controlled access. Alongside these technical measures there are comprehensive and effective policies and processes in place to ensure that users and administrators of University information are aware of their obligations and responsibilities for the data they have access to. By default, people are only granted access to the information they require to perform their duties. Training is provided to new staff joining the University and existing staff have training and expert advice available if needed. <b>Retention</b> Under the GDPR and DPA personal data collected for research purposes can be kept indefinitely, providing there is no impact to you outside the parameters of the study you have consented to take part in. Having stated the above, the length of time for which we keep your data will depend on a number of factors including the importance of the data, the funding requirements, the nature of the study, and the requirements of the publisher. Details will be given in the information sheet for each project. <b>Contact us</b> The Principal Investigator leading this research is Serena Gonsalves-Fersch 07764847574 <a href="mailto:SG1391@live.mdx.ac.uk">SG1391@live.mdx.ac.uk</a>  The University's official contact details are: Data Protection Officer Middlesex University The Burrells London NW4 4BT Tel: +44 (0)20 8411 5555 Email: <a href="mailto:dpofficer@mdx.ac.uk">dpofficer@mdx.ac.uk</a>

Page 1 and 2 – customised to the research project

Page 3, 4 and 5 – Middlesex university template



### Appendix 3 – Complete Coded List of Interviewees

Sr No.	Primary Category	Secondary Category	Location / Rem	Code
1	CLO	Consultant	UK/ UK	L11
2	Thought Leader	Consultant	Europe/ Global	T12
3	Consultant	Vendor	UK/ UK	C13
4	CLO	CLO	UK/ UK	L14
5	Consultant	Vendor	India/ Global	C15
6	CLO	Researcher	US/ Global	L16
7	Thought Leader	Researcher	UK/ UK	T17
8	Vendor	Vendor	India/ Global	V18
9	Vendor	Coach	UK/ UK	V19
10	CPO	CPO	UK/Global	P20
11	Consultant	Tech start-up investor	Canada/ Global	C21
12	Thought Leader	Consultant	US/ Global	T22
13	CLO	Thought Leader	US/ Global	L23
14	CLO	CLO	Europe/ Global	L24
15	CLO	CLO	UK/ Global	L25
16	CLO	CLO	UK/ Global	L26
17	CPO	CLO	UK/ Global	P27
18	Thought Leader	Consultant	UK/ Global	T28
19	CPO	CPO	UK/ Global	P29
20	Thought Leader	Consultant	US/ Global	T30
21	CLO	Consultant	Australia/ A-Pac	L31
22	Thought Leader	Vendor	UK/ Global	T32
23	Consultant	Vendor	US/ US	C33
24	CLO	Consultant	UK/ UK	L34
25	Thought Leader	Consultant	UK/ Global	T35
26	Vendor	Consultant	UK/ Global	V36
27	CLO	CLO	China/ Asia	L37



Sr No.	Primary Category	Secondary Category	Location / Rem	Code
28	CPO	HR	UK/ Europe	P38
29	CEO	CLO	India/ India	E39
30	Thought Leader	Consultant	Malaysia/ A-Pac	T40
31	Consultant	Thought Leader	UK/ UK	C41
32	Thought Leader	Consultant	Europe/ Europe	T42
33	CLO	CLO	UK/ UK	L43
34	Thought Leader	Consultant	UK/ UK	T44
35	CLO	CLO	US/Global	L45
36	CLO	CLO	new Zealand/ New Zealand	L46
37	CPO	CPO	UK/ Global	P47
38	Thought Leader	Researcher	UK/ UK	T48
39	CLO	CLO	UK/ Global	L49
40	Thought Leader	Learning Analytics	US/ US	T50
41	COO	COO	UK/ Europe	O51
42	Thought Leader	Consultant	UK/ Global	T52
43	Consultant	Vendor	Canada/ US	C53
44	Thought Leader	Consultant	Canada/ Global	T54
45	CLO	CLO	UK/ Europe	L55
46	Thought Leader	Tech start-up investor	UK/ Asia	T56
47	CLO	Consultant	Malawi/ Africa	L57
48	Consultant	Vendor	UK/ UK	C58
49	Thought Leader	Consultant	US/ Global	T59
50	Consultant	Vendor	India/ Global	C60
51	Thought Leader	CLO	UK/ Global	T61
52	Thought Leader	Consultant	UK/ Global	T62
53	Consultant	Vendor	UK/ Global	C63
54	Thought Leader	Consultant	UK/ Global	T64
55	CEO	CEO	India/ Global	E65
56	CPO	CPO	UK/ Global	P66
57	Consultant	Vendor	US/ Global	C67
58	CLO	CPO	US/ US	L68
59	CLO	Thought Leader	Europe/ Global	L69
60	Consultant	CLO	UK/ UK	C70
61	Consultant	Vendor	India/ India	C71
62	Thought Leader	Consultant	US/ US	T72
63	Thought Leader	Consultant	US/ Global	T73
64	CLO	CLO	US/ US	L74
65	Consultant	CLO	UK/ UK	C75
66	CLO	CLO	Europe/ Europe	L76
67	CPO	Researcher	UK/ UK	P77
68	Thought Leader	Researcher	US/ Global	T78



## Appendix 4 – Sample Extracts of Transcripts

**12:01 Serena Gonsalves-Fersch:** What was the burning platform? What was the tipping point, which then when they went, we need to take a look at our learning infrastructure, was it an overall organisation change, acquisition, or was it a...?

**12:21 L24:** Yeah, so the current CEO is now about six, seven years, and the organisation has gone through a big change. So it's returned data, we had a big return to growth strategy that actually returned the company to growth last year. On the people side, on the HR side, they had gone through a lot of investment and changes and learning and talent was one of the areas which was always on the docket to look at. And it came around, I think, after they had done a few other things, and fixed a few other things. And I think for the next phase of growth for the organisation, which is a growth strategy rather than a return to profitability strategy, I think they realised that we needed to go to for another phase, I think the legacy approach to learning, there's a lot to be desired, as I mentioned, and so it just seemed like a natural place, then to go to do this much better, make some changes, make some investment. But as I said, I don't think they were really sure what changes had to be made. That's really been our job

- **On introducing L&D for change**

**01:33 Serena Gonsalves-Fersch:** Let's start with, then, if it's easiest, tell me some of your observations, let's leave COVID aside because I want to spend some time talking about these last five months and what will change but so generally on the landscape.

**01:52 T44:** Yeah, I think that L&D, the conditions of what's happening with learning and development, and for me, I like to look at learning and organisational development because learning is not about learning. It's actually about business. So, to me, you can't separate one from the other. But we do that. There has been a steady decline that has been going on now for at least 15 years of the research that I have been involved in. And all that's happened is that has been accelerated as part of some of the things that have been happening over the last few months as well as things like digital and how the world is changing. L&D, as things are changing, and L&D is struggling, it is finding it even harder to get traction. And there's a number of reasons for that. So for me, my observations are, as an industry, and dare I say it's, very difficult to determine it as an industry which I believe is one of the problems because

- **On general observations of the L&D landscape**



**21:17 T72:** It shows our problem, we've stuck with this stupid ass model for years and years and years, and then you bring in these people from operations running L&D, what are we supposed to do? I don't know. There's a Kirkpatrick thing. Let's follow that.

**21:32 Serena Gonsalves-Fersch:** Yeah. Happy sheets and behindss on seats. That's it.

**21:38 T72:** How do you think we've sold L&D for 10 years? That's how. Look at the usage, you like this? Buy more. Nothing about business impact. I call that stuff vanity metrics. I could sell the e-learning with the vanity metrics. I knew how to do it. It was crazy. It was insane and it's still like that. If I get on a call, I'll just shut that conversation down, I'm not talking about this with you. I just take that chance to educate them, and if I have to go about it with a softer way to talk to people, I just say, Look, I'm trained from an evaluation perspective. I didn't come out of a learning way. I kind of blame it on education, right? I didn't come out of the learning. I said, the way you evaluate a program is, what is your business question, you ask your question, and you answer it. You don't need this chain of evidence. Because I always get called to a client because they're like, we want to get to ROI. But oh my god, I can't get past level two, so I can never get an ROI. I'm like, are you kidding me? Are you straight up kidding me? It's insane. What's your question? Let's ask your question and answer it.

- **On L&D Impact Assessment**

**03:41 Serena Gonsalves-Fersch:** So was that the main focus around, obviously, in terms of setting up policies and processes and stuff within people? But the major focus on that was recruitment for a while?

**03:54 P47:** Yeah, I mean, definitely. Well, yes and no. And so we have a huge focus on culture. And so I had a team that was doing the recruitment, and obviously, they were dedicated 100% to the scale up recruitment activities. And I think at our highest month, we had recruited one person every day, throughout the month. So it was, I mean, yeah, compared to some companies small but for us, it was huge scale up. And but I also have recruited two people that were working as business partners. So we did a lot of work around. What could we do to really engage and motivate and develop the culture within the firm so we had a big off site event for the whole company in December last year where we bought all of the teams together and looked at ways of working building team charters doing work around our values. And really looking at how we could evolve the culture of the business. And I also recruited a head of learning and development. So one of the key things for us has been that knowledge transfer. And when I look at, when I look at learning and development across the business, I think you can split it generally into the three streams. So you've got the immediate learning and development. So what do I need to do to be

- **On setting up L&D in an Accelerating Organisation**



## Appendix 5 – Narrative Approach

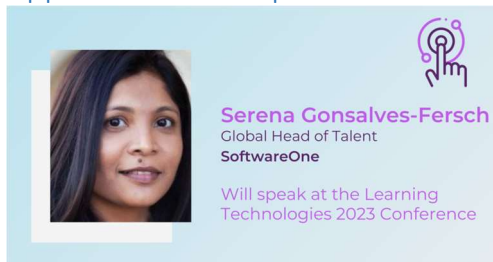
Whilst devising my methodological approach, I did not initially consider using narrative, and its possibility of inclusion only came to light as the interview process progressed.

Participants' willingness to share their experiences rendered a particularly rich body of data, prompting me to explore storytelling and narrative enquiry to fully harness this unique wellspring of information. Here I acknowledge the work of Harvey (2012) that there is no single definition of what constitutes a narrative. For my purposes, I use his definition that they are 'shared stories communicated through oral traditions or as the stories not only told in conversations but also encapsulated in written texts'.

Earthy and Cronin (2008) provide a set of definitions on analysis of the narrative in interviews. I use their definition of 'account', which they describe as an overall description of an event given by an interviewee during a research interview. As they note, 'An account may include a variety of different forms of talk and represents the interviewee's perceptions, understanding and experiences of the issue(s) being researched'. This wasn't a case study nor a hearsay narrative; on the contrary, this was an interviewee's story or an account of a previous occurrence, their response and any key takeaways from it.



## Appendix 6 – Example Conference Appearances



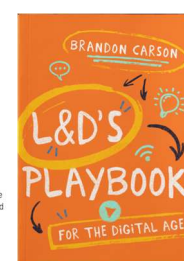
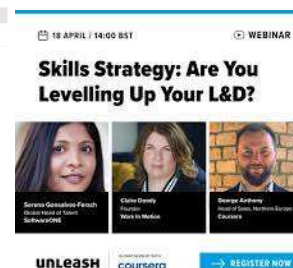
### LH #65 Start Me Up with Serena Gonsalves-Fersch



In a world where content about almost anything you may need to learn is readily available online, what should be the role of organisational L&D? Probably not its present one, which is all too often almost exclusively concerned with the centralized provision and curation of content for the organisation's learners – says Serena Gonsalves Fersch FLPI.

Serena is Head of Talent for the SoftwareONE Academy, but also a doctoral candidate, researching the future of learning and the L&D function in technology accelerating organisations. In this final episode of the current season, she talks to John about some compelling insights her research is turning up about the future of the L&D function.

- 0:00 - Intro
- 3:09 - Software One
- 5:20 - Serena's Doctorate Thesis
- 8:36 - Mistakes made when selecting vendors
- 15:04 - Advice for Vendor Selection
- 20:42 - L&D in tech start-ups and hypergrowth
- 30:40 - Business Applicability
- 38:38 - Advice for fast growing companies





## Appendix 7 – MORE Sign-Off Confirmation



Trans Disciplinary DProf Sub-Committee

The Burroughs  
Hendon  
London NW4 4BT

Main Switchboard: 0208 411 5000

24/06/2019

**APPLICATION NUMBER:** 6775

Dear Serena Gonsalves-Fersch and all collaborators/co-investigators

**Re your application title:** Transforming L&D

**Supervisor:** Brian Gertrude Shotte Sutton

**Co-investigators/collaborators:**

Thank you for submitting your application. I can confirm that your application has been given approval from the date of this letter by the Trans Disciplinary DProf Sub-Committee.

Although your application has been approved, the reviewers of your application may have made some useful comments on your application. Please look at your online application again to check whether the reviewers have added any comments for you to look at.

Also, please note the following:

1. Please ensure that you contact your supervisor/research ethics committee (REC) if any changes are made to the research project which could affect your ethics approval. There is an Amendment sub-form on MORE that can be completed and submitted to your REC for further review.
2. You must notify your supervisor/REC if there is a breach in data protection management or any issues that arise that may lead to a health and safety concern or conflict of interests.
3. If you require more time to complete your research, i.e., beyond the date specified in your application, please complete the Extension sub-form on MORE and submit it your REC for review.
4. Please quote the application number in any correspondence.
5. It is important that you retain this document as evidence of research ethics approval, as it may be required for submission to external bodies (e.g., NHS, grant awarding bodies) or as part of your research report, dissemination (e.g., journal articles) and data management plan.
6. Also, please forward any other information that would be helpful in enhancing our application form and procedures - please contact MOREsupport@mdx.ac.uk to provide feedback.

Good luck with your research.

Yours sincerely

Chair Dr Kate Maguire

Trans Disciplinary DProf Sub-Committee



## Appendix 8 – Code Book Snippet

<b>Code Count</b>	<b>Row Labels</b>	<b>Count of Interview</b>
<b>1</b>	70-20-10 model and approach	3
<b>2</b>	Accountability	2
<b>3</b>	Adaptability	2
<b>4</b>	Agility	3
<b>5</b>	AI	2
<b>6</b>	Autonomy development	2
<b>7</b>	Autonomy L&D	70
<b>8</b>	Autonomy training budget	4
<b>9</b>	Blended learning	1
<b>10</b>	Brain-based	3
<b>11</b>	Budget for training	76
<b>12</b>	Building capability learning leaders	1
<b>13</b>	Business acumen	14
<b>14</b>	Business domain knowledge	1
<b>15</b>	Business matter expert	2
<b>16</b>	Business partners	61
<b>17</b>	Business priorities	1
<b>18</b>	Business strategy	149
<b>19</b>	Business transformation	2
<b>20</b>	Business value	8
<b>21</b>	Change management	1
<b>22</b>	Changing employee roles	1
<b>23</b>	C-level sponsor	8
<b>24</b>	Client facing L&D	1
<b>25</b>	CLO responsibilities	20
<b>26</b>	CLO skill set	114
<b>27</b>	Coaching	22
<b>28</b>	Collaboration	7
<b>29</b>	College learning	3
<b>30</b>	Communication strategies	4
<b>31</b>	Community managers	1
<b>32</b>	Confidence and courage	2
<b>33</b>	Conflict	1
<b>34</b>	Consequences budget priorities	46
<b>35</b>	Content contextualisation	2



<b>36</b>	Content development vs content contextualisation	52
<b>37</b>	Continuous training	1
<b>38</b>	Cornerstone	1
<b>39</b>	Corporate learning	1
<b>40</b>	Cottage industries learning	4
<b>41</b>	Credibility	4
<b>42</b>	Critical skills analysis	3
<b>43</b>	Critical thinking skills	1
<b>44</b>	Cross-functional learning	3
<b>45</b>	C-suite expectations	54
<b>46</b>	Curating development content	83
<b>47</b>	Data analytics	8
<b>48</b>	Deep learning	6
<b>49</b>	Design operations	2
<b>50</b>	Develop management people managers	1
<b>51</b>	Digital Fluency	2
<b>52</b>	Digital journalism	1
<b>53</b>	Documenting success	15
<b>54</b>	Driver transformation	159
<b>55</b>	DT tools	190
<b>56</b>	Education allowances	30
<b>57</b>	Employability	1
<b>58</b>	Employee age impact	22
<b>59</b>	Employee engagement	60
<b>60</b>	Empowering decision-making	1
<b>61</b>	Evidence-based practices	1
<b>62</b>	Experimentation	5
<b>63</b>	Facilitator	5
<b>64</b>	Federated structure	1
<b>65</b>	Formal qualifications	6
<b>66</b>	Free development content	14
<b>67</b>	Gauging usefulness	1
<b>68</b>	Geographical differences	1
<b>69</b>	Geographical differences: content development	2
<b>70</b>	Geographical differences: culture	35
<b>71</b>	Geographical differences: DT tools	9
<b>72</b>	Geographical differences: educational incapacity	2



<b>73</b>	Geographical differences: government subsidy	2
<b>74</b>	Geographical differences: guilds	1
<b>75</b>	Geographical differences: HR	1
<b>76</b>	Geographical differences: innovation	14
<b>77</b>	Geographical differences: L&D operating structure	1
<b>78</b>	Geographical differences: L&D role	1
<b>79</b>	Geographical differences: labour laws	1
<b>80</b>	Geographical differences: linguistic diversity	1
<b>81</b>	Geographical differences: local facilitators	8
<b>82</b>	Geographical differences: work councils	1
<b>83</b>	Global L&D team	1
<b>84</b>	Government regulations	2
<b>85</b>	Government subsidies	2
<b>86</b>	Growth mindset	30
<b>87</b>	High attrition	1
<b>88</b>	HR business partners	5
<b>89</b>	Hyper growth L&D	1
<b>90</b>	Hyper growth plus and minus	46
<b>91</b>	Hyper growth start-ups	1
<b>92</b>	Immersive experiences	43
<b>93</b>	Impact managers	1
<b>94</b>	Impact of Covid	23
<b>95</b>	Informal learning	26
<b>96</b>	Infrastructure	1
<b>97</b>	Innovation	2
<b>98</b>	Input from learners	30
<b>99</b>	Intellectual capital	1
<b>100</b>	L&D competency frameworks	1
<b>101</b>	L&D employer brand	9
<b>102</b>	Leadership/management training	2
<b>103</b>	Learner-centred	49
<b>104</b>	Learning acumen	3
<b>105</b>	Learning expert	1
<b>106</b>	Learning organisation	1
<b>107</b>	Learning suites/specialists	1
<b>108</b>	LinkedIn Learning	2
<b>109</b>	Listening tour	1
<b>110</b>	LMS	3



<b>111</b>	Loose governance	1
<b>112</b>	Management/leadership training	86
<b>113</b>	Measurement L&D	183
<b>114</b>	Measurement of performance	1
<b>115</b>	Mentoring	9
<b>116</b>	Micro learning	7
<b>117</b>	New ways of learning: DT tools	2
<b>118</b>	New ways of learning: input from learners	2
<b>119</b>	New ways of learning: L&D operating model	1
<b>120</b>	New ways of working : business strategy	2
<b>121</b>	New ways of working : divisional leads	1
<b>122</b>	New ways of working : HR business partners	1
<b>123</b>	New ways of working: blended learning	3
<b>124</b>	New ways of working: business partners	5
<b>125</b>	New ways of working: business strategy	17
<b>126</b>	New ways of working: business value	12
<b>127</b>	New ways of working: CLO skill set	12
<b>128</b>	New ways of working: content development vs content contextualisation	9
<b>129</b>	New ways of working: curating content development	1
<b>130</b>	New ways of working: divisional leads	9
<b>131</b>	New ways of working: DT tools	108
<b>132</b>	New ways of working: HR business partners	3
<b>133</b>	New ways of working: immersive experiences	9
<b>134</b>	New ways of working: immersive learning	1
<b>135</b>	New ways of working: informal learning	5
<b>136</b>	New ways of working: input from learners	15
<b>137</b>	New ways of working: L&D operating model	148
<b>138</b>	New ways of working: L&D operating strategy	1
<b>139</b>	New ways of working: L&D operating structure	1
<b>140</b>	New ways of working: learner input	9
<b>141</b>	New ways of working: linguistic diversity	2
<b>142</b>	New ways of working: local facilitators	1
<b>143</b>	New ways of working: M&A	1
<b>144</b>	New ways of working: performance consulting	15
<b>145</b>	New ways of working: restructuring L&D team	6



<b>146</b>	New ways or working: content development vs content contextualisation	1
<b>147</b>	New ways or working: learner input	1
<b>148</b>	One-step specialist lesson	1
<b>149</b>	Organisational culture	4
<b>150</b>	Organisational effectiveness	1
<b>151</b>	Outdated L&D	124
<b>152</b>	Outsourcing L&D	38
<b>153</b>	Partnering training company	1
<b>154</b>	Perceptions learning	6
<b>155</b>	Performance consulting	7
<b>156</b>	Performance marketing	1
<b>157</b>	PG Learn	1
<b>158</b>	Phase of maturity	22
<b>159</b>	Phases organisational culture	2
<b>160</b>	Position management	1
<b>161</b>	Rapid work flow analysis	1
<b>162</b>	Regional L&D	3
<b>163</b>	Relationship management learners	1
<b>164</b>	Required skills and experience	1
<b>165</b>	Requirements L&D	9
<b>166</b>	Role of HR	81
<b>167</b>	Role of L&D	297
<b>168</b>	Scholar practitioners	3
<b>169</b>	Self-developing content	1
<b>170</b>	Self-developing professionals	43
<b>171</b>	Self-reflection	4
<b>172</b>	Setting priorities	10
<b>173</b>	Setting priorities : learner input	1
<b>174</b>	Setting priorities : upskilling for L&D	1
<b>175</b>	Setting priorities: business partners	9
<b>176</b>	Setting priorities: business strategy	28
<b>177</b>	Setting priorities: business value	14
<b>178</b>	Setting priorities: CLO skill set	11
<b>179</b>	Setting priorities: content development vs content contextualisation	4
<b>180</b>	Setting priorities: curating content development	3
<b>181</b>	Setting priorities: DT tools	22
<b>182</b>	Setting priorities: HR business partners	2



<b>183</b>	Setting priorities: immersive experiences	5
<b>184</b>	Setting priorities: input from learners	4
<b>185</b>	Setting priorities: intellectual capital	1
<b>186</b>	Setting priorities: L&D operating model	116
<b>187</b>	Setting priorities: learner input	3
<b>188</b>	Setting priorities: performance consulting	14
<b>189</b>	Setting priorities: restructuring L&D team	4
<b>190</b>	Shaping culture of work	9
<b>191</b>	Sharing success	2
<b>192</b>	Silo learning	4
<b>193</b>	Size of organisation	3
<b>194</b>	Skill-based development	3
<b>195</b>	Slack	1
<b>196</b>	Social media	3
<b>197</b>	Strategic vs tactical	46
<b>198</b>	Subject matter expert	11
<b>199</b>	SuccessFactors	1
<b>200</b>	Support achieving development strategy	1
<b>201</b>	Systems and data	1
<b>202</b>	Talent acquisition strategy	1
<b>203</b>	Talent management	5
<b>204</b>	Tapping into existing knowledge	2
<b>205</b>	Technical knowledge	1
<b>206</b>	Technology experts	47
<b>207</b>	Traditional metrics measurement	50
<b>208</b>	Training behavioural change	2
<b>209</b>	Traits CLO	1
<b>210</b>	Virtual learning experience	4
<b>211</b>	WebEx	1
<b>212</b>	Workday	1
<b>213</b>	Working in silos	19
<b>214</b>	Workplace assessment skills	1
<b>215</b>	Workplace culture	118
	<b>Grand Total</b>	<b>3681</b>