

**DEVELOPING
A
LEARNING
CULTURE**

This book was developed by James H. Saylor

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FORWARD

This book is part of the VICTORY series. For over 30 years, the pursuit of a simple, easy-to-use, proven, inexpensive management system for any organization has been my focus. MANAGING FOR VICTORY™ is this system. MANAGING FOR VICTORY™ system includes:

Visioning creates a common focus

Involving everyone establishes a superior organization

Continuously improving achieves excellence

Training, educating, coaching, facilitating, mentoring develops a learning culture

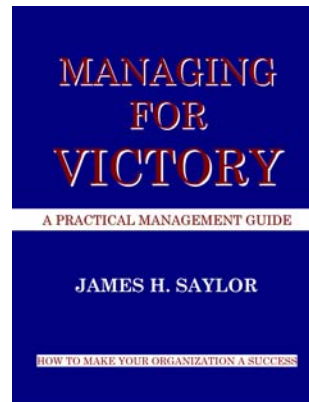
Owning the work fosters empowerment

Recognizing and rewarding builds high performance

Yearning ensures success

Customers drive VICTORY

Progressive Leaders guide VICTORY



ABOUT THE AUTHOR

James H. Saylor is the founder of The Business Coach, an organization focusing on helping other organizations achieve their specific VICTORY. He has assisted many organizations in discovering, designing, developing and doing successful management systems. In addition, he has led, managed, coached, trained and facilitated many individuals and organizations in achieving their specific VICTORY. Jim has over 30 years experience in operations, organizational development, sales, marketing, training, project management, quality and logistics. He has prepared and presented many highly proclaimed training seminars and workshops globally. Jim is a widely recognized leading champion of Total Quality Management in the 1980s and 1990s. Jim is the author of the *TQM Simplified*, and co-author of *Customer-Driven Project Management* published by McGraw-Hill. Jim's latest book is *MANAGING FOR VICTORY™*. For further information about Jim's books, guides and workshops see websites: www.managingforvictory.com or www.thebusinesscoach.org or email coachjim@thebusinesscoach.org.

DEVELOPING A LEARNING CULTURE

POWER OF PERFORMANCE

People provide the power for VICTORY. Organizational success comes with individuals working in a positive organizational environment, with effective and efficient systems, using appropriate technology. Ultimately, the performance of the people in the organization can make or break the organization. To be successful, the organizational focus must be made relevant on an individual basis to achieve desired performance. Performance depends on both willingness and performance.

The successful organization requires a learning culture. A learning culture nurtures continuous organizational and individual progress. A learning culture requires people development. People development focuses on competence in the organization. It involves training, education, coaching facilitating, and mentoring. People development is a never-ending process for everyone in the organization. This is an investment that must be made for ultimate success. People development provides the skills, knowledge and attitude -- the ability and willingness to make it happen.

This guide focuses on developing a successful organization. As part of the successful organization's development, organization and people development are critical. It is important to ensure integration of both organizational development and people development to achieve a common purpose. People development develops one individual at a time. Organizational development targets improvement of the whole organization. They will be successful when both are aligned and moving toward creating a learning organization.

The learning organization is created using a systematic development process for success of a specific organization. In many organizations, development is a reactive process. This is especially true of the people development activity; i.e. education, training, and so on. People development is a reaction to some perceived “people problem.” There is no two hour lecture or one day seminar that will solve people issues. Also, in some cases, a non-people development solution is more appropriate. For instance, the problem may be solved with process improvement rather than training. For a successful organization, people development must be a strategically planned proactive approach based on achieving specific organizational and individual outcomes.

Creating a learning culture requires launching a disciplined process focused on the competence of the individual in the organization, establishing a learning system, allowing self-development, recording development activities, and naming development achievements. Develop learning culture considerations include:

Launch the learning organization

Establish a learning system

Allow self-development

Record development activities

Name learning achievements

Learn - **Launch the Learning Organization**

Competence is the focus of the learning organization.

The ultimate advantage of any organization comes from being a learning organization. A learning organization has

the flexibility to adapt to the ever-changing environment. This requires organizational competence, as well as, a high degree of individual competence in the organization. Therefore, the target of any learning organization is competence. Figure 1 shows competence as the focus in any learning process. Competence is gained by knowledge, skills, application, and experience. In addition, competence is relevant within the organizational culture of a specific organization. Successful organizations launch a learning organization aiming at their specific organizational competence.

The competence of the people in the organization is a key issue to success. The role of everyone in the organization changes in a VICTORY organization. Executives take on a more visionary role. Managers become leaders. Workers add improvement responsibilities. This requires new competencies. Although there are many similar competencies in successful organizations, competencies vary by organization. In addition to the variance of competencies in each organization, the competencies are ever changing depending on the organizational environment. This means it is necessary for each organization to become a learning organization, and each individual to constantly grow and develop, in order to keep pace and remain competitive.

Since competencies are the foundation for a learning organization, the development of a competency plan for your specific organization launches the learning organization. This section outlines an action process for developing a competency plan. The action process should be performed as quickly as possible using readily available resources to minimize cost. The objective of the competency plan should be eight to twelve major competencies for each of the following: senior management, managers, and frontline workers. There should be some overlap of the major competencies for everyone in the organization.

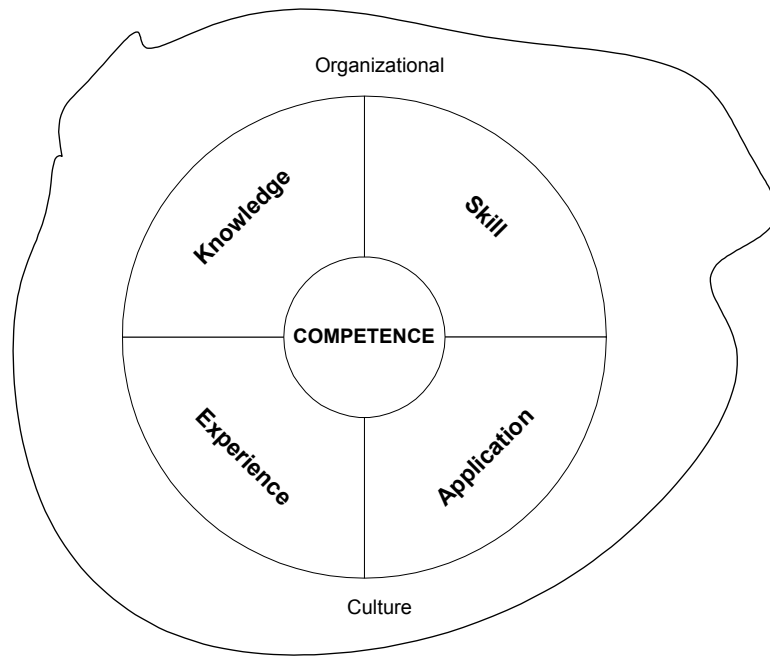


Figure 1 Learning process.

Learn - Launch the Learning Organization Action Process

Conceive a common view of ideal future organization

Outline a list of competencies required in your ideal organization

Make a list of competencies of high performers in the organization

Provide target competencies from the lists

Evaluate the Draft Competency Plan

Test some people in the organization

Evaluate results

Name the final list of competencies in Competency Plan

Test the competence of all people in the organization

Competent - Conceive A Common View of Ideal Future Organization

Since the organization has a major impact on competence, the future view of the organization provides the starting point in launching the learning organization. Therefore, the first step in launching the learning process is clarifying the common view of the future ideal organization.

Competent - Outline a List of Competencies Required In Your Ideal Organization

Once the view of the ideal organization is clarified, the organization determines future competencies for the organization. There are several ways to accomplish this process. There are many standard instruments available to help in this task. Further, there are many competency models to use as a starting point. This book provides one competency model. Also, there are numerous resources found on the Internet. For instance, the U.S. Department of Labor and Education published kinds of competencies and skills that workers must have to succeed in today's workplace. In this document five competencies encompassing resources, interpersonal, information, systems and technology are outlined with specific characteristics. In addition, skills and personal qualities are described as a three-part foundation. Also, there are many organizations that specialize in this area that can be used for assistance. Finally, the organization can outline a list of competencies required in the ideal organization.

Competent - Make A List of Competencies of Current High Performers

Once the organization has an idea of the ideal competencies, the organization needs to determine competencies of current high performers in the organization. This is necessary to validate the high performance competencies within the current organization. In order to isolate high performance competencies, the organization defines the performance criteria for key positions in the organization. Next, the organization selects individuals that consistently exceed the performance criteria. These individuals are the high performers in the organization. They are studied to

determine the high performance competencies in the organization. This can be accomplished by interviews and assessments. As a minimum, the high performers can be assessed using the ideal competencies as a baseline while looking for distinguishing competencies.

Competent - Provide Target Competencies from the List

Once the organization has an idea of competencies required for a successful organization in the future with the competencies of high performers in the current organization, a list of competencies can be compiled for the organization's competency plan.

For instance, this book outlines competencies valued for a successful organization as follows:

- Customer orientation
- Visioning for a common focus
- Involving everyone in team-based organization
- Continuous improvement
- Training, etc. for learning culture
- Ownership of work
- Recognition and reward
- Yearning for success
- Progressive leadership

In addition, the organization determines the technical and professional competence required of high performers in the organization:

Within each of the competence areas, the organization defines some specific skills and characteristics. For instance, the competency for involvement in teams could include:

- Sharing a common focus
- Promoting team participation
- Building trust
- Respect and consideration of others

- Resolving interpersonal conflict
- Participating in team meetings
- Effective communication
- Persevere to achieve results
- Perform team problem solving
- Work with consensus decision making

Competent - Evaluate the Draft Competency Plan

At this stage, the organization reviews all the competencies in the Draft Competency Plan. This should be accomplished using a team of representatives from key parts of the organization. If possible, the team should include a facilitator with competency expertise. The evaluation of the competency plan answers these key questions:

- Are these the core competencies for the future success of the organization?
- Are these competencies applicable throughout the organization?
- Which competencies apply to what people in the organization?

Competent - Test Some People in the Organization against Competencies

Next, the competency plan is pilot tested with a representative number of people in the organization. This is accomplished with a competency assessment using the draft competency plan. This step provides feedback on the list of competencies as they apply in the organization beyond the high performers.

Competent - Evaluate Results

The results of the pilot test of the competency plan are evaluated to validate the competency plan.

Competent - Name the Final List of Competencies for the Organization

Finalize the competency plan with a list of competencies for the organization. As a minimum the competency plan should include the baseline competencies for everyone in the organization.

Competent - Test Competence

Once the competency plan is finalized, the entire organization can be assessed against the plan competencies. This provides the baseline for the learning process. This assessment can be a self-assessment that is shared with the manager or the assessment can be jointly conducted with manager.

Learn - Establish a learning system

ABILITY X WILLINGNESS = PERFORMANCE

Once the learning organization understands competencies for success, the learning organization establishes a learning system. The learning system incorporates all of the necessary methods required to achieve competence. As a minimum, education, training, facilitation, and mentoring should be integrated into any organization's learning system. In

addition, coaching, self-development activities, experimentation, and on-the-job training must be considered depending on the specific organization.

Learn - Establish a Learning System Action Process

Establish performance standards

Name development needs

Action plan to design learning system

Build a learning system

Let learning occur

Evaluate learning

Enable - Establish Performance Standards

The first step in developing a learning system is establishing performance standards. This step requires further analysis of the organizational competencies to define specific performance standards for each job. This is accomplished through a performance analysis to determine high performance standards.

Enable - Name Development Needs

Once the organization knows the requirements of each job, the organization needs to design the learning system to achieve the desired job performance. Generally, areas of development embrace the integration of leadership, membership, teamwork, business systems, management, and technical systems. This is shown in figure 2. Within each of these areas, each organization requires individuals to possess

certain job competencies to achieve the high performance standards. Development needs come from the competencies of both the organization and the individual. Development needs are identified through a variety of methods. The first step is to decide the specific competencies required for success in the organization.

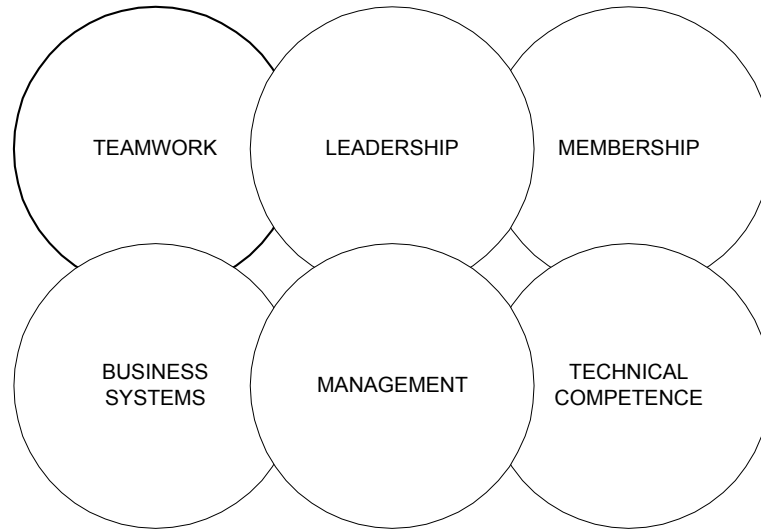


Figure 2 Areas for development.

This requires the organization to perform a further analysis of present and future competencies to establish desired competencies of the organization. This can be accomplished using the action process for identifying competencies. Next, the organization develops a valid instrument to assess the competence of the individuals in the organization. Each individual in the organization can use the assessment to determine where he or she currently stands. This self-assessment starts the development process. This tool assists the individual in the identification of individual development opportunities. In addition, it is always advisable to have others also complete assessment instruments to provide you

additional feedback. Self-assessment and feedback are both useful in identification of development needs.

Enable - Action Plan Learning System

Once the development needs are identified, the organization further designs the learning system by an action plan. The action plan considers all the methods as shown in Figure 3 to develop a continuous learning system. The action plan understands that the learning process starts with knowledge as the foundation. Knowledge is gained mainly through self-development and education. There are several alternatives to providing education. We are most familiar with the lecture that we experienced in school. Skills are the next element of the learning process. They can be gained by training and experimentation. The most common training formats include workshops and seminars. Next, the person needs to apply their knowledge and skills on the job. Facilitation and on-the-job training help this process. Finally, the learning process involves experience. Coaching and mentoring can be used to improve the learning process at this stage. Remember, all this learning takes place in the context of the organizational culture. A person may be competent in one organizational culture and not competent in another organizational culture. The action plan provides a design of the learning system that considers all the elements of the learning process.

Enable - Build a Learning System

Once the development system is identified in the action plan, the organization builds the learning system using appropriate methods as shown in the learning process. This should include: educating, training, coaching, facilitating, and mentoring. In addition, the learning system needs to consider that most learning occurs through work experience.

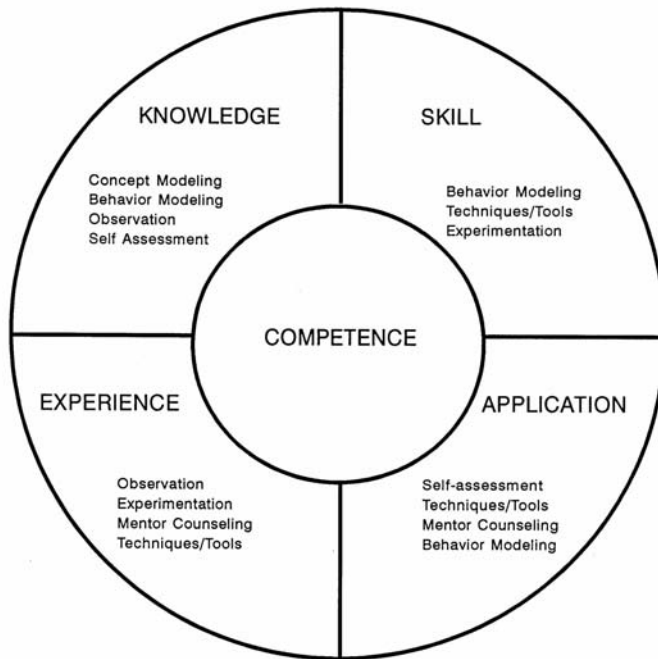


Figure 3 Learning process with methods.

Educating

Education targets gaining knowledge. Education provides the “what.” It provides an understanding of ideas, concepts, theories, history, background, situations, etc. Education provides the knowledge to intelligently select from many alternatives for a specific situation.

Education can be gained from a variety of sources from formal methods like seminars, lectures, and college courses, to more informal methods like self-study, observation, and interviewing.

Training

Training begins the focus on a specific application. It not only involves knowledge, but it also considers attitude and skills to perform specific tasks. Training is geared more toward a specific need of the individual and the organization. The training process, as shown in figure 4 involves: analysis, design, development, implementation and evaluation.

Training can be received from workshops, seminars, and on-the-job training.

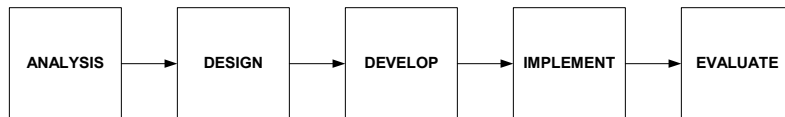


Figure 4 Training process.

On-The-Job Training

On-the-job training targets job skills. This is one of the primary methods used in many organizations. In many cases on-the-job training can be more effective using the following process.

Introduce the process

Demonstrate properly

Encourage practice

Attend to the positive

Let trainee perform

Coaching

Coaching involves intensive application focused on specific results. Coaching is geared to the particular needs and situation of an individual or team. The coaching process, as shown in figure 5 involves planning, preparing, performing and probing repeated over time to achieve a specific outcome.

Facilitating

Facilitating involves assisting with the application of a specific process to make it easier to achieve desired outcomes. Facilitating reinforces learning through performance of the process. Facilitating is usually a team or group intervention. Facilitators are important support people in an organizational support structure. They help the team reach its mission without being a team member. Facilitating is geared to the particular needs, expectations, and situation of the organization.

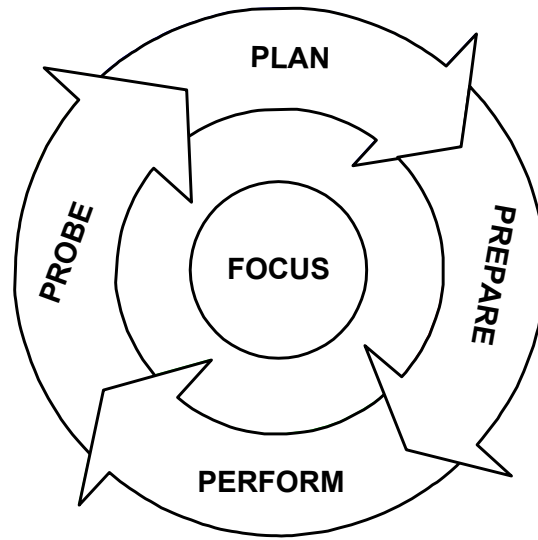


Figure 5 Coaching process.

Mentoring

Mentoring is providing an experienced person to offer guidance and support. They serve as a management interface and support. As such, they need to have credibility and influence in the organization. They provide support by offering a listening ear. They are useful to provide advice on handling issues that involve internal politics. Frequently, a mentor can assist the team in introducing and implementing a critical initiative that is counter to the present organizational culture.

Enable - Let Learning Occur

Once the development needs are identified and the organization enables development, the organization lets learning occur. The organization provides the opportunity for organization and individual development. The process for individual development is described in the next section on allowing development.

Besides individual development, the organization needs to develop the organization. This requires the organization to establish structured programs to build the envisioned future organization.

Enable - Evaluate Learning

There are several aspects of evaluating the development process. First, the actual performance results of the organization provide the ultimate assessment. Second, the people development system in the organization must be constantly evaluated to ensure a competent organization. Third, each individual action plan must be reviewed regularly.

The ultimate goal of all people development activities must be success as defined by the organization. The people development process should be evaluated against the organization's criteria for success. The people development process must be periodically evaluated to ensure:

- business results are achieved
- organizational competencies are relevant
- individual competencies are still appropriate
- learning methods are effective
- specific interventions i.e. training, coaching, mentoring are working
- support resources are sufficient

- behavioral and attitude changes are being observed in the workplace
 - organizational outcomes are being achieved
- The individual action plan should be reviewed regularly to ensure the following:
- individual development progress is on track
 - individual development supports changing organizational views
 - offers of encouragement and support
 - recognition and rewards are provided
 - additional items for Individual Action Plan are generated
 - determination of individual performance
 - reevaluation of self-assessment
 - recognizing what is going well
 - compiling lessons learned

Learn - Allow Self Development

Improvement begins with “I.”

Although the organization needs to launch and ultimately institute a learning system, the individual has the ultimate responsibility for his or her own development. In order for learning to be effective, it is important to make learning personal. The following is an action process for individual development:

Plan

Establish learning objectives and goals

Recognize priorities

Share plan with others

Obtain support

Normalize actions

Always focus on success

List progress

Personal - Plan

Once the development needs are identified and the organization enables development, the individual can focus on development actions through action planning. The Action Plan ensures that specific actions are accomplished to become competent within the organization. The actions are the result of defining the gap between where the individual currently is and where the individual needs to be for future success. The action plan should emphasize both short-term and long-term development needs. Short-term needs are categorized as development needs, and long-term needs are growth areas. These needs should be included in an individual development action plan. The action plan provides the what (actions), when (milestones), and how (education, training, coaching, mentoring, or on-the-job training). Figure 6 shows an individual development action plan worksheet.

Personal - Establish Learning Objectives and Goals

As part of the planning process, you need to establish development objectives. These objectives should recognize the long-term needs of the organization, as well as your individual development needs. You should look 2 or more years into the future for competencies to develop. In addition to a long-term focus, it is preferable to take small steps to make big achievements. These are the goals to achieve the objectives. The learning objectives are similar to strategic objectives in an organization and the goals. These are the

strategic objectives and goals for your individual success within the organization.

Individual Development Action Plan Worksheet

Objectives	Method	Develop	Grow
Customer Orientation	Training/ experience	X	
Systems Thinking	Education		X
Goal Setting	Training	X	
Working with others	Coaching/ experience		X
Business Results	Experience	X	

Figure 6 Individual development action plan worksheet.

Personal - Recognize Priorities

Today, it is extremely important to focus on the high priority development requirements. Simply, you will accomplish what you decide to focus on. Therefore, it is important for you to find the vital learning opportunities. This may require the assistance of others inside and outside the organization. Of primary importance for maintaining support and establishing priorities in the organization is your immediate manager. Other sources of information include professional, industry organizations, and government agencies.

Personal – Share the Plan with Others

As mentioned above, you may need to get input from others to help prioritize development activities. In addition, it is good to share the plan with others to ensure progress toward the right objectives. Beside your immediate manager, this can include peers internal and external to the organization, Human Resources personnel, and stakeholders in your success to include family members.

Personal - Obtain Support

Besides the obvious sources of support as mentioned above i.e. manager, human resources, family, friends, and professional organizations, it is helpful to improve your chance of success to have a mentor and/or learning partner. A mentor is usually someone with the wisdom of experience. A mentor can help you with moving forward, refocusing efforts, and offering encouragement. A learning partner is a peer. The learning partner can be critical in understanding your situation and holding you accountable for progress. Both a mentor and learning partner require a formal commitment to support your pursuit of success. This formal commitment requires regular contact. As a minimum, you need to meet with your mentor quarterly and with your learning partner monthly. Ideally, you should have access to your mentor and learning partner whenever you need support, with contact with your mentor monthly and your learning partner weekly.

Personal - Normalize Actions

It is up to you to take appropriate action. You need to incorporate learning into day-to-day activities. You must

constantly be engaged in learning. However to internalize the learning, you must plan when to do learning activities. The learning activity can be simply reflecting on the learning of the day and/or more formal education, training, coaching and experiential activities. Regardless of the learning activity, it can be normalized by setting aside a certain time each day, or specific days and times to do learning activities. If you spent 15 – 30 minutes a day, you could develop your expertise in any area in a short period of time. Therefore, it is essential to make focused learning a habit.

Personal - Always Focus on Success

You must select learning activities that will lead to achieving success in the future. This process provides the focus for your success. In order to maintain a constant focus on your success, you need to examine your learning objectives and goals daily, weekly, quarterly, and yearly.

At the beginning and end of each day, you should review your daily activities. At the beginning and end of each week, you should update the status of weekly targets. In addition, each quarter you should analyze progress toward quarterly goals and yearly objectives. Finally, every year you need to review yearly objectives and you should revise and add new objectives as appropriate to remain focused on success.

Personal - List Progress

It is important to list progress. The next section discusses recording development activities for the organization. In addition, the individual development action plan provides a strategic plan to guide individual learning development. Also, each individual should document the specific details of his or her learning for continuous success. As a minimum, the individual needs to document his or her progress on

paper. In today's world, it is easy to list, check, modify, review and change learning progress on a computer or personal data assistant (PDA).

Each individual needs to decide the specific details needed to track his or her individual learning. The information in the individual development action plan provides a starting point. In addition, the individual should consider tracking daily activities, weekly targets, quarterly goals and yearly objectives. Further for each objective, the individual might construct an action plan with these elements: learning goals, the purpose for striving to achieve the goal, development activities with current status, support resources required, potential restraining forces and driving forces to achieve goal, and visible measure or indicator of success.

Learn - Record Development Activities

The high performing organization ensures growth of people by recording development activities. This requires the organization to establish and maintain a system for recording development activities. The development record system involves the following:

Review performance standards

Establish levels of development

Create a formal process to record development

Outline requirements

Record progress

Display progress

Record - Review Performance Standards

The learning organization reviews the performance standards to align the focus of development activities with the purpose of the organization. All development activities must align with the strategic objectives of the organization supported by performance standards. The performance standards provide the baseline for job requirements. The organization needs to list all the job requirements to meet performance standards. Next, the job requirements are reviewed to determine job requirements for development.

Record - Establish Levels of Development

Once the job requirements for development are established, the organization determines levels of development. A person in the organization cannot be expected to be fully qualified without some level of growth in the organization. As a minimum, every new hire requires an orientation into the organization. This provides “the way it is done here” information. Beyond the new hire orientation, each job category should have its own potential for growth. For instance in the technical and support areas, a person may develop from novice, proficient, technician, inspector and master. In the management path, the levels of development may include moving from levels of lead, supervisor, manager, executive and senior management.

Record - Create a Formal Process to Record Development

The process for recording development needs to be formalized within the organization. This formal process depends on the needs of the organization. The most common tool for

documenting development is a development or training record. The formal process involves outlining the requirements and recording progress. A Development Record is shown in Figure 7.

Record - Outline Requirements

As shown in the Development Record figure, the development requirements are listed in an approved development record. The development requirements are the requirements as determined in step 1 above.

Record - Record Progress

The development/training record process involves determining applicable requirements, scheduling a start date and entering a completion date. The applicable requirements depend on the level of the individual. The applicable requirements can be checked with a pencil to indicate a job requirement. Once development is started, this is documented in the start date column and completions are written in the completion date column.

Record - Display Progress

The Development Record provides a view of development for the organization, manager and individual. In addition, a development chart can be used to display progress of a specific department. The development chart provides a visual view of qualifications of a specific area. The development chart is effectively displayed in an area in full view of all personnel. An example of a development chart is shown in figure 8.

DEVELOPMENT RECORD

DEVELOPMENT RECORD NUMBER: CS-2

POSITION/JOB: CUSTOMER SERVICE

Issue Number:	Issue Date:
Rev.	Number of Items:
Owner:	Approval:
Prepared By: (Print or Type)	Approved By: (Print or Type)
Signature:	Signature:

Name: _____

Figure 7a Development record.

DEVELOPMENT RECORD

	Development Requirement	Scheduled Date	Completion Date
1	Perform stock quotation process.		
2	Receipt of all customer requests.		
3	Verification of customer or request information and correction, if necessary.		
4	Determination of price and availability.		
5	Special pricing entered into information system.		
6	Quote provided to customer.		
7	Perform the order process.		
8	Receiving order from customer.		
9	Verifying order with quotation or price.		
10	Completing Sales Order Form.		

Figure 7b Development record.

Development Chart Customer Care

	Takes Order	Knows Services	Gives	Sells Product
Joe				
Mary				
Pete				
Sue				

Figure 8 Development chart.

Learn - Name Learning Achievements

The organization needs to be proactive in recognizing all learning accomplishments. This is necessary for learning of individuals, teams and the organization. The following process recognizes learning achievements:

Notify

Announce

Market

Escalate

Name – Notify

The first step in naming development achievements is to notify immediate leaders of success. In addition, other people in the organization, such as Human Resources and Public Relations should be informed of special accomplishments.

Name - Announce

The second step in naming development achievements is to announce the success to the entire organization. This can be accomplished by newsletter, bulletin board postings, celebration activities, and so on.

Name - Market

The third step in naming the development achievements is to market the success to encourage others to pursue development activities. The example of success provides impetus to others to pursue or continue development. The organization needs to take every opportunity to promote and publicize the learning culture.

Name - Escalate

The fourth step in naming development achievements is to escalate communication of development success to top leaders in the organization. In addition, the organization needs to further communicate success stories in developing a learning culture to others outside the organization.

ACTION PROCESS

The action process below targets developing individual competence within an organization.

Define competencies for success

Establish development requirements

Validate development needs

Enable development

Learn to learn

Observe progress

Pursue lifelong learning

1. **D**efine competencies for success. List six to eight competencies required for your success in your organization 2 to 3 years in the future.
2. **E**stablish development requirements. First, determine all the requirements for success in your job. Second, list the items that can be developed through training, education, etc.
3. **V**alidate development needs. From the list of development items for success on your job, establish items for your specific development. Write your list of development items.
 - a. Prioritize the list above to determine the top one through four items for your development.
 - b. Review with other stakeholders your top-priority development items.

- c. Select one item to develop to competence in your organization.
- d. Determine how you will know you are competent in your selected item. Remember, this can be a measure of success on-the-job or observable behavior (yours or others).

4. **E**nable development

Determine an action plan to focus on development of your top-priority item with a goal of competence within 60 to 120 days.

5. **L**earn to learn

- a. Complete your action plan by learning through one or more of the following: training, education, coaching, and experience.
- b. Determine through your experience in developing competency, your specific restraining and driving forces for learning.

7. **O**bserve progress

Keep a log on progress toward developing competency. Make sure you reflect daily, weekly, monthly and at completion.

8. **P**ursue lifelong learning

Establish a plan for lifelong learning as a result of your experience developing competency.

