



EFMD Research:
Partnerships in Learning and Development

EFMD Excellence in Practice Awards 2010

Alfa Laval • EDF • Lufthansa • MAN • Swiss Re • HSBC
Ashridge • EADA • London Business School •
Oxford University • WHU

What do they have in common?

They are all winners and finalists of the
EFMD Excellence in Practice Awards

Partnerships in Learning and Development: EFMD Excellence in Practice Awards 2010

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Introduction

The EFMD Excellence in Practice (EIP) Awards recognise and promote outstanding partnerships between companies and learning and development providers. Case studies of good practice and collaboration are reviewed by an international judging panel of representatives from EFMD, the corporate world, business schools and executive development centres. The promotion and recognition of excellence in practice is deeply embedded in the DNA of EFMD, bridging academic and corporate worlds and valuing special collaborations.

Successful co-operation between providers and clients builds on a sustainable partnership and the EIP initiative has focused on such partnerships since its launch in 2007. The parallel focus of the EIP Awards is on impact, with the core question being: “Is the initiative solving what it is intended to solve?”

EIP 2010, alongside core areas in corporate learning, looked at four categories:

- executive development
- professional development
- organisational development
- talent development

This EFMD Research Report provides an insight into the ideas and methods behind successful partnerships and how learning and development interventions can have strategic significance as well as providing context and building relevance.

The 2010 EIP cases demonstrate a collaborative approach focused on providing solutions. This report is by no means a summary and cannot do justice to the variety of approaches, the diversity of cases and the several hundreds of pages of top-quality submissions. The finalist and winning cases are being published in a special supplement of the EFMD *Global Focus* magazine and by Emerald Group Publishing.

Martine Plompen
Editor

Overall observations

On partnerships

The 2010 EIP jury members were impressed by the very strong sense of partnership throughout the learning interventions and noted that sustainable partnerships have common building blocks:

- a joint core design team
- stakeholders involved in overseeing the interventions
- a steering group for regular monitoring
- clear roles and responsibilities for all

The EIP cases demonstrate that strong corporate sponsorship is a key component for a highly relevant learning intervention. Flexibility and the availability of senior managers, sponsors and stakeholders are crucial for impactful learning. Some examples of the latter are: sharing organisational views and values, the CEO acting as champion, the executive committee actively participating in a programme and senior managers responding rapidly to specific questions.

The EIP cases show how a core design team from both partners is a commonly used and very effective approach. Targeted pre-work is often used to build a high level of trust and openness from the start of the intervention. Additionally, the creation of a communication and engagement strategy is an equally important building block for impactful learning interventions.

The division of roles and responsibilities of the partners vary depending on context but generally include:

- facilitating effective learning experiences
- sponsoring employee development
- tracking impact
- developing links with overall organisational development and performance management
- taking responsibility for learning

Cost avoidance and cost reduction are crucial in today's world and the financial aspects of a partnership are ideally dealt with in an open way. Cost-effective approaches often include reducing programme length, using e-learning modules, increasing pre-programme activities or introducing peer coaching.

All of the 2010 EIP cases represent a true win-win situation based on engagement and full commitment, which was greatly welcomed by jury members.

On learning and development frameworks

In general, the winning cases all display a combination of learning experience and expertise, strategic insight, organisational knowledge, communication skills and delivery capacity that is consistently excellent throughout a project.

The 2010 EFMD EIP cases also reflect the current broader trend towards increased focus on an extended learning journey and the relative decline in importance of specific programme elements in favour of a multi-phased process. Excellence in practice often means a multi-faceted learning experience including self-paced learning activities, facilitated peer group discussions and reflection exercises.

While formalised and clear processes are vital for strategic corporate learning, the lines between the more traditional phases of discovery, design, delivery and debriefing seem to be blurring. In parallel, there is a breaking down of the boundaries between the roles of teacher, researcher, coach or consultant.

Comments from the EIP 2010 jury members include the statement that submissions often include consulting components that go beyond a traditional learning and development design formula.

More specifically, boundaries between design and pre-programme work are increasingly disappearing, with this period being dedicated in many cases to:

- building openness and trust to enable a rapid start to the intervention
- developing a problem-solving methodology aligned with the overall corporate culture
- coaching and stretching of teams and team leaders
- focusing on business issues with the intensive involvement of senior leadership

The importance of variety in learning styles and the ability to address content from various perspectives are vital for multi-faceted learning experiences. In parallel, self-paced activities, peer group discussions, facilitated activities, shared reflection and focus projects are all ingredients of a learning environment with a close participant match and tailored training tracks.

One can observe from the EIP submissions that operational excellence and an appropriate learning environment facilitate:

- maintenance of employee and supervisor enthusiasm
- alignment with specific work situations
- involvement of all stakeholders and specific awareness-building mechanisms
- ongoing support for team leaders and line managers
- reaching out in an unfamiliar context and creating an enabling infrastructure
- ongoing inquiry into relevance
- strong involvement of subject experts
- involvement of top management
- experiential learning
- building intellectual, social and emotional capability in an holistic way

Learning and development frameworks will vary according to the type of intervention. Nevertheless, overcoming management skills gaps, creating company-wide networks, enhancing talent development plans, bringing about cultural change, solving specific business challenges or stepping up operational excellence will require a strategic and high-impact approach.

On co-construction

A true co-construction mode based on a constant dialogue enables the learning initiative to deal with change over the running time of the intervention. The 2010 jury members were impressed by the many submissions that allowed a lot of room for transition.

A learning intervention designed as a team effort builds on a deep sense of co-operation and requires additional time and effort. Being connected at individual and at organisational level runs in parallel. Both contexts are important and are subject to the evolution of challenges. Approaches used in the 2010 EIP submissions include regular content meetings, newsletters, on-line confidential surveys, facilitated institutional dialogue, individual phone interviews or senior-level strategic conversations, post-programme interviews and mentoring.

Co-design and co-creation require a high level of willingness on the part of all the partner organisations involved. Essential vehicles are engagement, integration and communication. The EIP jury panels noted how organisations in the cases submitted have created communication and engagement strategies to maximise project impact, for example through formal and informal mechanisms covering stakeholder groups and/or multi-layered monitoring schemes.

On leadership competencies

A leadership competency or leadership development framework is in place in the large majority of client organisations participating in the EIP 2010 Awards though the EIP process did not address definitions of abilities, attitudes, behaviours, capacities, competencies, skills or talents. The relevance of capability areas and behaviours underpinning and driving strategy needs to be seen in the specific context of a company's leadership profile and culture.

At the core of the leadership frameworks are mastering people skills, achieving operational excellence and performance, displaying an external focus and awareness and achieving business results at the individual and organisational level.

Respecting the wide diversity of contexts and rich palette of approaches, one can observe that the outcomes of learning interventions are related to:

- overcoming management skills gaps
- developing personal leadership capabilities
- focusing learning and development on business challenges
- owning the business challenge
- formulating personal development plans
- building capability for coaching
- creating company wide networks
- introducing a common language
- addressing cultural change
- improving a sense of community
- inspiring others
- being consistently outcome oriented
- enabling change management
- strengthening customer focus
- navigating through change
- building resilience to change
- handling change pro-actively
- translating strategic guidelines
- deploying corporate values
- stepping up operational excellence
- dealing with change in professional identities
- developing people to think and act differently
- delivering unpopular messages

On business impact

Observations from the EIP 2010 jury panels underline the need to focus on effectiveness and impact.

The 2010 EIP cases clearly show how tracking business impact on learning and development is not a stand-alone exercise.

In addition, the various components in the “business impact” process need to be dealt with: identifying business drivers, defining learning goals and applying measurement metrics. Meaningful information, both qualitative and quantitative, is obtained through the in-depth alignment with talent management processes and business development initiatives.

Almost all the 2010 EIP cases deploy a multi-faceted approach to progress indicators and learning measurements. In order to demonstrate change and improvement, it is vital to focus on investigating and defining the appropriate indicators as early as possible in the process. The tracking of how agreed learning objectives are being achieved is in most cases done through participant surveys, sponsor appreciation tracking or senior management appraisal, the alignment with performance management systems and employee survey analysis.

Kirkpatrick is a commonly used framework and approaches include:

- how participants' immediate feedback is complemented by discussions with line managers, pre- and post- intervention meetings with participants' sponsors or reactions specifically focused on the relevance of the key programme learning objectives
- tracking knowledge and skills before, during and after the programme through, for example, quarterly post-programme interviews to track progress and to supplement additional coaching
- tracking behavioural changes related to personal and business objectives can be implemented through surveys and 360° feedback and through tracking implementation of specific action plans and performance management cycles
- project outcomes and experiences, communities of practice, alumni networks, cross-departmental collaboration or company-wide career opportunities illustrate transformational impact on the company

There is no exact formula since impact, which comprises both tangible and intangible elements, is specific to an organisation's strategic priorities and company culture. Various stakeholder groups probably hold mixed views on efficiency. Additionally there are timeframes and an often-changing context. The EIP submissions confirm the overall reality that there is more improvement where initially there was most room for improvement.

The EFMD Excellence in Practice – EIP – Framework

This EFMD initiative was launched in 2007. The cases submitted since – by the 170 organisations involved – have been reviewed by an international judging panel against the EIP Framework and criteria as specified in this and the following page.

The challenge

- **The initial formulated challenge**
- **Ownership of the business challenge**
- **Nature of involvement of other stakeholders**
- **Link between the business challenge and corporate strategy**
- **Desired impact of the learning and development initiative**

The commitment

- **Analysis of changes required in human behaviour/performance**
- **Committed deliverables and impact**
- **Financial parameters of the learning and development initiative**
- **Guaranteed commitment of stakeholders**
- **Agreed timeline and major milestones**

The initiative

- **The learning and/or development objectives**
- **The learning methods and environment**
- **Progress indicators and learning measurement**
- **Distribution and alignment of roles of the corporate learning and development organisation and the provider**

The impact

- **Indicators of impact used by the corporate learning and development organisation?**
- **Actual changes caused by the learning and development initiative**
- **Ultimate impact on the company's business?**
- **Owners and stakeholders expressing the perceived impact**

The Excellence in Practice – EIP – Criteria

Operational excellence

- **Sustainable partnership:** Demonstration of a genuine, trustful partnership between providers and beneficiaries. Selection or matching process used followed by continuous relationship management based on clear criteria assessing the effectiveness of the relationship. Innovative process in the partnership relation.
- **Appropriate learning environment :** Effective and balanced use of programme location and learning options. Minimising cost-of-ownership while maximising effectiveness.

Programme management

- **Vigorous programme profile:** Programme design (definition of intended learning outcomes), programme structure and delivery (range of delivery modes used), elements of innovation, programme evaluation (levels of quality assessments, for example participant feedback, evaluation of learning, competence development).
- **Consistent participant match:** Definition, communication and management of entry requirements (selection methodology). Participant relationship management. Diversity of cultural, professional and educational background.

Business impact

- **Alignment with corporate strategy:** Link between programme objectives and outcome with specific strategic challenges for the company.
- **Embedding in wider HR processes:** Integration in learning and development processes (talent development, professional development, leadership development, organisation development practices) as well as alignment with other HR processes (for example performance management).
- **Visible corporate sponsorship:** Identified owner of the corporate issue involved in the programme design, delivery and evaluation.
- **Positioning in learning and development portfolio:** Importance of the initiative to the learning and development function (resources/time consumed, impact on the credibility and image of the corporate learning organisation) – complexity and scale of the initiative.
- **Financial Aspects of Programme / ROI:** Financial strategy and planning of the programme.
- **Impact for the company:** Quantitative and qualitative indicators for business impact.

Excellence in Practice Awards

Winners and finalists since 2007

Excellence in Practice Award 2010 – Winners

Category: Executive Development

“Engineering the Future: A Transformational Learning Journey”

by MAN SE & WHU – Otto Beisheim School of Management & Saïd Business School, University of Oxford, Executive Education Centre

Authors:

Tatjana Thiel (Head of Management Development, MAN SE)

Lutz Kaufmann (Academic Director of the Program, WHU – Otto Beisheim School of Management)

Gerd Islei (Academic Director of the Program, Saïd Business School, University of Oxford, Executive Education Centre)

Category: Organisational Development

“Developing Internal Consulting Capability within the National Trust”

by The National Trust & Ashridge Consulting Ltd.

Authors:

Paul Boniface (Director of People and Governance, The National Trust)

Billy Desmond (Business Director, Ashridge Consulting)

Category: Professional Development

“Partnership in the Design, Development and Delivery of the Advanced Consulting Skills Program”

by HSBC North America Learning and Development & Lake Forest Graduate School of Management

Authors:

Scott Farley (Vice-President, Learning Specialist, HSBC North America L&D)

Howard Prager (Director Lake Forest Corporate Education, Lake Forest Graduate School of Management)

Category: Talent Development

“Developing a sustainable supply of leaders”

By Pon Holdings BV & ORMIT BV

Authors:

Marcella Slechtenhorst (Manager HRD, Pon Holdings BV)

Cindy Post (Management Development Consultant, ORMIT BV)

Category: “Special Cases”

“An innovative Case of Synergistic Learning and Development between Venture Capital, Start-up and University”

By Prism Venture Capital & KickApps Startup & Bentley University

Authors:

Woody Benson (Partner, Prism Venture Capital)

Alex Blum (Chief Executive Officer, KickApps)

Pierre Berthon (Clifford Youse Chair of Marketing and Research, Bentley University)

Excellence in Practice Award 2009

Winner

Partnership in Planning, Development, Design, Delivery and Evaluation of the General Management Programme

Allyson Stewart-Allen (London Business School) & Michael Christ (Lufthansa School of Business)

Finalists

Partnership in Learning & Development – Virtual Strategy Development Programme

Mike Malgrem, Ghislaine Caulat, Fran Montague (Ashridge Business School) & Peter Bailliere (Alfa Laval)

Partnership for Organizational Transformation – Collectively co-creating a new WVAA 2.0 culture

André Wierdsma (Nyenrode Business Universiteit) & Herman van Hemsbergen (WVAA)

Excellence in Practice Award 2008

Winner

The Best of both Worlds” – Exploiting the Power of Experiential Learning in the Swiss Re Business Context

Jonathan Lagoe (Impact) and Antoine Kissenpfennig (Swiss Re)

Finalists

Thinking out of the Box – Building Partnerships for Leadership Development

Enric Bernal (EADA) and Michel Marchand (EDF)

How Solvay and Team Academy created an In-Company Learning Environment that Learns by Itself

Johannes Partanen (Team Academy – Polytechnic University of Jyväskylä) and Etienne Collignon (Solvay – Solvay Team Factory)

Excellence in Practice Award 2007

Winner

Developing Future Business and Civic Leaders: the Emerging Leaders Program

Philip L Quaglieri & Sherry H. Penney (University of Massachusetts Boston, USA) and Jennifer Waldner (State Street Corporation)

Finalists

Innovation in Learning: How the Danish Leadership Institute developed 2,200 managers from Fujitsu Services from 13 different countries

Jeremy Hill & Jørgen Thorsell (Mannaz, formerly called Dieu) and Ian Williams, (Fujitsu Services)

Building of the Kitchen Table: In search of an Alternative Model for In-company leadership Development Programs

Chris Sigaloff & Iselien Nabben (Nyenrode Business Universiteit, NL) and Erwin Bergsma (SVB Sociale Verzekerings Bank)

Jury panel 2010

The jury panel was composed of representatives from EFMD members companies, business schools and executive development centers, as well as from Emerald Group.

EFMD expresses its sincere gratitude for their outstanding contribution:

- Jessica Davis (Emerald Group Publishing Ltd)
- Patrick De Greve (Vlerick Leuven Gent Management School)
- Axel Dornis (MLP Finanzdienstleistungen AG)
- Sarah Gilbert (Emerald Group Publishing Ltd)
- Jan Ginneberge (EFMD)
- Bart Groenewoud (CapGemini University)
- Jérôme Gueugnier (EDF Group)
- Nadim Habib (Faculdade de Economia da Universidade Nova de Lisboa)
- Per Erik Johannessen (BI Norwegian School of Management)
- Lene Augusta Jørgensen (Aarhus School of Business)
- Stefan Kayser (ThyssenKrupp Academy GmbH)
- Antoine Kissenpfennig (Swiss Reinsurance Company Ltd)
- Françoise Lassalle-Cottin (Euromed Management)
- Rebecca Marsh (Emerald Group Publishing Ltd)
- Werner Müller (ERGO Versicherungsgruppe AG)
- Rudi Plettinx (CCL – Center for Creative Leadership)
- Martine Plompen (EFMD)
- Almudena Rodriguez Tarodo (Grupo Santander)
- Bob Stilliard (Ashridge)
- Joachim von Berg (EFMD)
- Hans-Jörg Wagener (Volkswagen Coaching GmbH)
- John Wills (London Business School)
- Ulrich Winkler (European Business School)
- Achim Wolter (Siemens AG)

Testimonials

Feedback from EIP participants and jury members

The EIP Award submission allowed us to reflect on the future development of our project. There was considerable learning for all of us and the EIP submission has cemented our partnership even further.

EIP 2009 participant

The selection process and exchanges with the different EIP jury members were most enjoyable and a true learning experience.

2010 EIP jury member

The EIP Award was an opportunity to evaluate and improve our initiative and made already strong relationships even stronger.

EIP 2009 participant

To participate in the EIP Award is a great way to disseminate and communicate our joint initiative, both at international level as well as internally.

EIP 2009 participant

All of us involved in the project found the EIP Award submission a very beneficial exercise, especially in terms of documenting the initiative and capturing the learning.

EIP 2010 participant

The EIP submission turned out to be a very instructive experience and a perfect vehicle to communicate our passion and belief in our project.

EIP 2010 participant

An extraordinary benchmarking opportunity!

2010 EIP jury member

The 2011 Excellence in Practice – EIP – Awards: Call for submissions

Partnerships in Learning and Development
EFMD Excellence in Practice Award

The EFMD Excellence in Practice Award recognises outstanding and impactful partnerships between companies and learning and development providers.

The EFMD Excellence in Practice Award 2011, call for submissions

More info on: www.efmd.org/eip

Deadline for submissions: 1 May 2011

EFMD is an international, not-for-profit, membership organisation, based in Brussels, Belgium. With more than 730 member organisations from academia, business, public service and consultancy in 80 countries, EFMD provides a unique forum for information, research, networking and debate on innovation and best practice in management development.

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