



GoodPractice Insights

The Learning Habits of Leaders and Managers

June 2012

Acknowledgements

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Contents

1. Introduction

- 1.1 Report context
- 1.2 Taking a different approach to L&D reporting
- 1.3 Aims and objectives of the research

2. Executive Summary

- 2.1 Summary of key research findings
 - 2.1.1 Key challenges faced by managers of people
 - 2.1.2 Where managers go for support
 - 2.1.3 Perceived effectiveness of the support managers receive
- 2.2 Striking a balance between formal and informal learning

3. Research Methodology

- 3.1 Using manager insights to assess learning needs
- 3.2 Summary of research methodology

4. Discussion of Key Findings

- 4.1 Overview of key challenges faced by managers
- 4.2 Overview of where managers go for support
 - 4.2.1 Support from other people
 - 4.2.2 Support from line managers and other managers
 - 4.2.3 Leveraging existing informal learning
 - 4.2.4 Support from the HR function
- 4.3 Support from the intranet
 - 4.3.1 Problems with the intranet
 - 4.3.2 Measuring intranet effectiveness
- 4.4 Support from the internet
 - 4.4.1 How managers use the internet
 - 4.4.2 How managers use smartphones
- 4.5 Attitudes and perceptions towards formal courses
 - 4.5.1 Useful courses provided by organisations
- 4.6 Attitudes and perceptions about using audio and video for learning

5. Conclusion

- 5.1 Why this report is different
- 5.2 Summary of results
- 5.3 Next steps for your organisation
- 5.4 Work with us

6. Appendices

Appendix 1: About the research sample

Appendix 2: The interview process

Appendix 3: Research theme identification and content analysis

Appendix 4: Full list of manager challenges

Appendix 5: Analysis of manager challenges by sector

1. Introduction

1.1 Report context

GoodPractice's vision is to create and deliver the most current, relevant and practical learning and development resources for managers and leaders. Key products include online toolkits, e-learning modules, videos for learning, and content designed for mobile devices, as well as bespoke learning solutions. As an organisation, we aim to be at the forefront of effective online learning provision.

A key aspect of developing our products and services is regular interaction with our clients and end users to gather information from them. Primarily, we seek to better understand the learning habits and preferences of our core audience: leaders and managers. To do this, we use a range of quantitative and qualitative analysis techniques. This includes:

- survey based evaluation
- search term analysis
- web and mobile analytics
- in-depth user testing exercises

In addition, we conduct an ongoing programme of end user focused research studies designed to improve our knowledge of their learning preferences. These studies include *The People and Performance Link: How Managers Learn (in their own words)* research report,¹ *The People and Performance Link: Challenges of Being a Manager (in their own words)*² report and our popular bi-annual *UK Learning Trends* series.³

The *Leaders and Managers Insights* research study is the next step in our ongoing programme of research. Taking a more qualitative approach, this study builds on our existing knowledge by taking an in-depth look at the learning preferences and perceptions of our core audience. It also provides a useful starting point for any organisation seeking to understand more about how its people managers (or indeed any core group of employees) learn and the perceived effectiveness of its existing learning provision.

¹ Peter Casebow and Owen Ferguson, *The People and Performance Link: How Managers Learn (in their own words)*, GoodPractice Research Report (January 2012). Available at: <http://goodpractice.com/blog/resources/how-managers-learn-in-their-own-words-white-paper/>.

² Peter Casebow and Owen Ferguson, *The People and Performance Link: Challenges of Being a Manager (in their own words)*, GoodPractice Research Report (April 2010). Available at: <http://goodpractice.com/blog/resources/the-challenges-of-being-a-manager-in-their-own-words/>.

³ Now in its third year, the GoodPractice UK Learning Trends survey is conducted twice a year. The latest report, published in January 2012, is available at: <http://goodpractice.com/blog/resources/goodpractice-learning-trends-survey-focus-on-stability-efficiency-and-growth/> (April 2012). The next (sixth) Learning Trends report is due for publication in August 2012.

1.2 Taking a different approach to L&D reporting

The CIPD's annual *Learning and Talent Development* report is perhaps the UK's best known survey of current and emerging practice in the Learning and Development (L&D) industry. It provides an annual snapshot of L&D priorities, and the effectiveness of its practices as reported by senior L&D, HR and talent practitioners. The research for this report also considered the effectiveness of L&D practice, but from a wholly different perspective.

Like many reports on learning provision, the CIPD report gathers the opinions and perceptions of learning professionals rather than the learners directly. The *Leaders and Managers Insights* study presents the views of a key group of end users of learning provision – managers of people. Directly engaging with those on the receiving end of learning turns the predominant model of L&D reporting on its head. This approach enables a unique comparison of L&D's own internal perspective on the effectiveness of its learning provision, alongside how front-line consumers of organisational learning perceive it in practice.

1.3 Aims and objectives of the research

The primary objectives of the *Leaders and Managers Insights* study are to:

- Identify common themes in relation to the **key challenges** that managers of people face.
- Identify **where these managers go for advice and support** to help them meet the challenges of their roles.
- Establish whether the support that managers find is **effective** in improving their overall performance.

2. Executive Summary

2.1 Summary of key research findings

The main findings are summarised as follows:

- The key challenges that managers face.
- Where these managers go for support in meeting these challenges.
- Whether the support they find is effective.

2.1.1 Key challenges faced by managers of people

The biggest challenge faced by the managers we spoke to related to having **difficult conversations** with their team members, which was ranked far ahead of all other issues. This was followed by managing the **capability** and **(under) performance** of their teams, and **coaching** and **training** of team members. Dealing with **negative reactions** and **resistance to change** was also highlighted as a key concern for managers, as well as **managing remote teams** effectively.

2.1.2 Where managers go for support

The results demonstrate that people managers today have a variety of **support options** available to help them meet these challenges. These include approaching a range of **people** from within their own organisational networks and externally, using **various technology-based learning tools** such as a corporate intranets or learning management systems, and seeking support from **the internet** (via both PCs and smartphones). Attending **formal training courses**, **workshops** and other more traditional face-to-face learning options were also highlighted by the survey sample.

2.1.3 Perceived effectiveness of the support managers receive

To help them meet the challenges of their roles, more than half of the managers we surveyed revealed a strong preference for **informal** face-to-face or telephone discussions with **peers**, more **senior managers** and **informal experts** where appropriate. Managers specifically mentioned the benefits of speaking directly to their peers to **share their experiences** and highlight **best practice**.

Corporate **intranets** received **negative feedback** from around 50% of the survey sample. The main problems were identified as their **large size**, **poor structure**, difficulties with **site navigation** and **dry, uninspiring content**.

Using the **internet** was mentioned as a positive tool for learning by around a quarter of the respondents, who used it regularly to search for information and **specific tools** to help them **manage their teams** more effectively.

Formal training courses were mentioned in a positive way by just over a quarter of our respondents. Managers said that where they had attended a training course or workshops, they found it helpful in meeting the specific challenges of their roles.

2.2 Striking a balance between formal and informal learning

As the results demonstrate, when it comes to meeting the day-to-day challenges of their roles, people managers have a strong preference for learning by **informal means**. The majority preferred to seek advice and guidance directly from their peers, senior colleagues and informal experts within their organisation. However, this strong tendency to opt for informal learning is at odds with the perceptions of learning professionals reported in the latest CIPD *Learning and Talent* report. L&D provision still tends to rely on traditional methods of workplace learning such as 'formal courses' and 'classroom and trainer-led instruction'.⁴ This implies an imbalance between **what learners want** and **what L&D is currently providing**.

As the *Leaders and Managers Insights* study shows, informal and social learning methods such as **peer-to-peer coaching**, **on-the-job learning** and tapping into **informal hubs of expertise** are by far the most popular methods of learning used by managers of people in today's workplaces. Given these preferences, L&D departments need to ask themselves what they are doing to **optimise the informal learning** already happening in their organisations.

L&D's role should not be to try to prescriptively 'manage' informal learning but to find out what informal learning is taking place in order to build up a picture of how it is contributing to performance. As well as encouraging people to **engage** with effective forms of informal learning, L&D can nurture the development of internal networks and communities of practice, and develop high quality resources to support informal experts and mentors.

⁴ *Learning and Talent Development Survey*, Annual Survey Report 2011, CIPD. Available at: <http://www.cipd.co.uk/binaries/5688%20LTD%20SR%20report%20WEB.pdf> (April 2012).

3. Research Methodology

3.1 Using manager insights to assess learning needs

GoodPractice undertook this study to identify the key challenges that managers of people face in their roles, where managers seek support to help meet these challenges and whether the support they find is effective. The *Leaders and Managers Insights* study demonstrates that gathering detailed qualitative feedback from end users about the effectiveness of different types of learning provision they receive is a key way of assessing their overall learning needs.

By following the methodology used by this study, learning departments can develop a unique insight into the potential learning needs of key groups of employees. More importantly, this **end user focused approach** also helps to determine how well (or otherwise) an organisation's existing approach to learning provision is meeting the core learning needs of key groups of employees.

3.2 Summary of research methodology

Eight organisations of differing sizes from both the public and private sector were approached to participate in the research. More information about these organisations and the target groups of managers who were interviewed is available in *Appendix 1 – About the research sample*.

A semi-structured interview framework was used to uncover the key elements of each manager's role, and the typical challenges, issues and difficulties they face. Further information about the interview stage of the methodology is available in *Appendix 2 – The interview process*. Interview transcripts were produced and broken down into individual discrete **comments**. A card-sort exercise was used to group the comments into relevant research themes. Three main themes were identified:

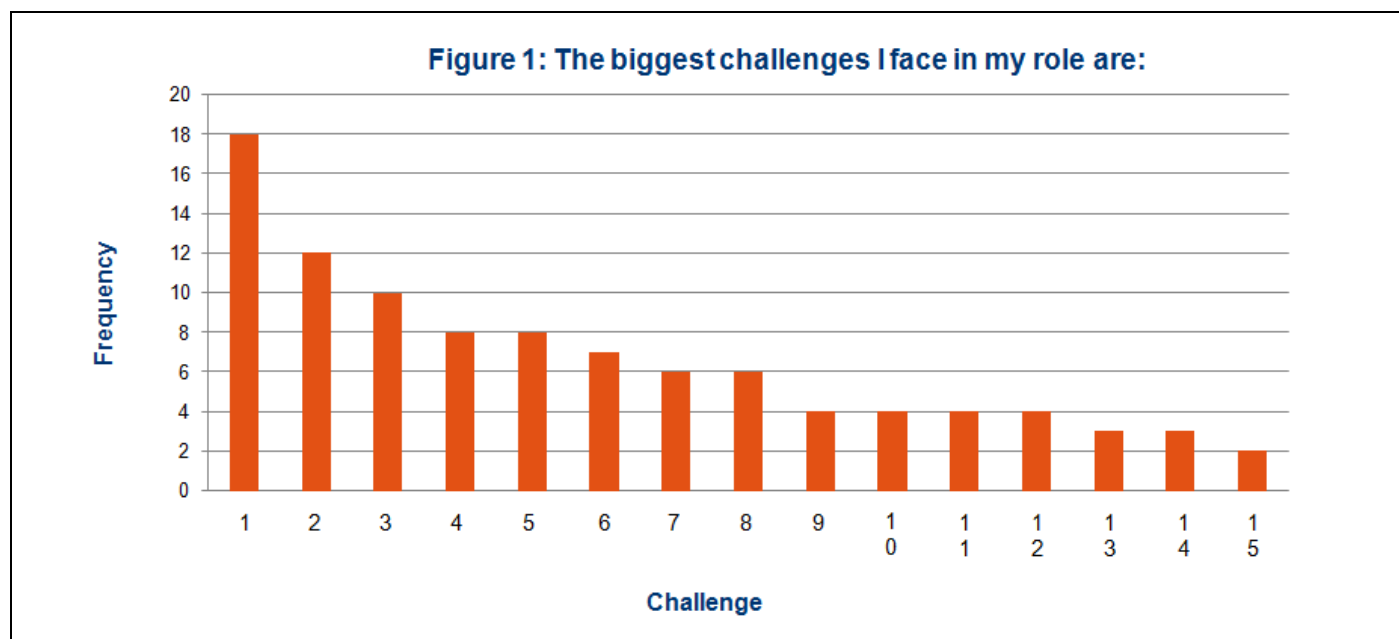
- **Research Theme 1: job and organisational context.** Comments in this theme largely relate to each manager's specific job role and responsibilities, their team and their organisation.
- **Research Theme 2: challenges faced in the manager's role.** Comments in this theme related to the sorts of issues and problems managers faced in their roles on a regular basis.
- **Research Theme 3: actions when faced with a challenge.** Comments in this theme focused on the specific behaviours and actions that managers demonstrated in order to meet the challenges of their role.

Further information about the research themes and the resulting data analysis can be found in *Appendix 3 – Research theme identification and content analysis*.

4. Discussion of Key Findings

4.1 Overview of key challenges faced by managers

Figure 1 below shows the range of the most typical challenges faced by managers of people.⁵ **Having difficult conversations** was mentioned most frequently, by 50% of the interviewees. This particular management challenge is ranked significantly ahead of all other issues. The second most frequently mentioned challenge is **managing the performance and capability** of team members, which was mentioned by 33%. This is followed in third place by **coaching and training** of team members, which was raised by 28%.



- Key:**
- 1 Having difficult conversations
 - 2 Managing capability/performance
 - 3 Coaching/training my team
 - 4 Resistance to organisational change
 - 5 Managing remote teams
 - 6 Motivating my team
 - 7 Managing absence/sickness
 - 8 Giving negative feedback
 - 9 Recruitment
 - 10 Managing my time effectively
 - 11 Volume of emails
 - 12 Number of internal systems/paperwork
 - 13 Volume of internal meetings
 - 14 Meeting sales targets
 - 15 Covering for other managers

⁵ 26 separate challenges were identified during the manager interviews. Figure 1 shows the first 15 challenges. The full list can be found in *Appendix 4*.

In equal fourth place in terms of overall relevance to managers was dealing with **resistance to organisational change** and the management of **remote teams**. Both were mentioned by 22%. In total, 26 different challenges were identified across the whole survey sample. As expected, the frequency of different challenges varied considerably across the different organisations that made up the survey sample.

The top five most frequently mentioned management challenges are:

1. having difficult conversations
2. managing performance
3. coaching/training
4. dealing with resistance to change
5. management of remote teams

Given the nature of the challenges that managers of people face in their roles, what are organisations, and learning departments in particular, doing to address the obvious need for support in these key areas? What specific learning initiatives and tools are being put in place to help managers be more effective in the areas they find most difficult?

The managers we spoke to mentioned formal courses and using intranet resources, although their perceived effectiveness at meeting their needs was patchy. The majority of managers we spoke to said that they would prefer to approach a peer or more senior colleague for help in dealing with a complex people management challenge. Indeed, previous GoodPractice research highlights that 82% of managers will consult with a colleague at least once a month, and 83% say this is either 'very' or 'fairly' effective as a means of support.⁶ This issue is discussed in more detail in section 4.2.

More detailed analysis of the manager challenges faced by individuals employed in **banking**, **telecommunications** and the **motoring membership** sectors is detailed in Figures 2 and 3 which can be found in *Appendix 5 – Analysis of manager challenges by sector*. Please note that there is no graph for the motoring membership sector.

4.2 Overview of where managers go for support

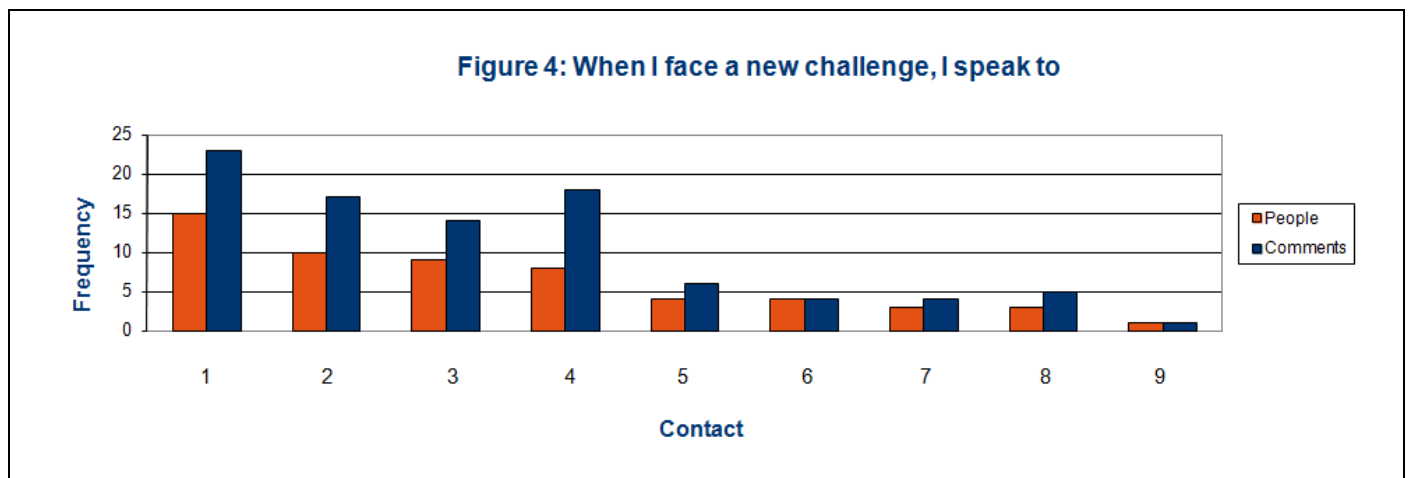
In terms of seeking support for the challenges they face in their role, it is clear that the managers we surveyed have a range of options available to them. These include:

- Approaching a wide variety of **people** both from within their own organisational networks as well as external professional contacts.
- Making use of various technology-based **internal tools** such as the intranet and job specific guides and frameworks etc.
- Seeking support from the **internet** (via both PCs and smartphones) using different search engines to access content-specific sites.

⁶ Peter Casebow and Owen Ferguson, *The People and Performance Link: How Managers Learn (in their own words)*, GoodPractice Research Report (January 2012).

4.2.1 Support from other people

Figure 4 below shows the full range of people-based support options that were discussed by the interviewees. Nine different groups were identified by the managers we surveyed, including the individual's own boss, their peer group, the HR and L&D functions, a coach or mentor and people from within the manager's own personal network (both inside and outside their organisation).



- Key:**
- 1 My boss
 - 2 Other managers
 - 3 HR (about process/procedures)
 - 4 HR (general)
 - 5 My internal network
 - 6 A subject report
 - 7 A coach or mentor
 - 8 L&D
 - 9 People outside my organisation

4.2.2 Support from line managers and other managers

By far the most popular form of support was for managers to approach their **immediate line manager** for advice. This was mentioned by 42% of the interviewees. The next most critical form of person-based support is **other managers** working in a similar role to the interviewee, which was mentioned by 28%. The majority of the comments were positive, describing immediate line managers and other managers as invaluable sources of guidance and support.

Despite the presence of bespoke corporate intranets, formalised training courses and dedicated HR support, the research results show that seeking informal advice from immediate line managers and peers is by far the most popular avenue of support used by managers in the workplace today. This allows managers to not only share best practice but also to support each other by sharing how they have addressed similar experiences.

This strong preference towards informal learning is highlighted by other GoodPractice research. For example, the *How Managers Learn* report demonstrated that ‘*informal chats with colleagues*’ were the most frequently used method of learning by managers.⁷ Similarly, in the fourth GoodPractice *Learning Trends* report, 64% of Learning Managers questioned predicted an increase in reliance on informal learning in the coming six months.⁸ Furthermore, 57% of Learning Managers predicted that associated spend on supporting informal learning would also increase in the next six months.

4.2.3 Leveraging existing informal learning

Given the predominance of informal and social learning in supporting the needs of people managers, organisations should ideally seek to capitalise on the informal learning already going on in their organisation by promoting and encouraging it wherever possible. According to Jay Cross, a leading authority on informal learning, this can include the following approaches:⁹

- Empowering managers to feel they can question existing processes and contribute their own improvement ideas.
- Encouraging a culture of ‘learning by doing’, and trial and error, where people are not penalised for mistakes.
- Developing internal wikis, blogs and other forums where people can ask questions and share useful information.
- Recognising and championing the existence of informal knowledge and information bases.
- Encouraging cross-working and collaboration between different teams and departments, to share knowledge, ideas and expertise.
- Leveraging social networking tools such as Yammer and Twitter to boost internal collaboration.

⁷ Ibid.

⁸ Stefania Scott, *The Learning Trends Index: Survey Report 4*, GoodPractice Research (January 2012).

⁹ Jay Cross, *Informal Learning: Rediscovering the Natural Pathways That Inspire Innovation and Performance* (Jossey Bass, 2006).

4.2.4 Support from the HR function

Some interesting results were returned in relation to the support received from the HR function. As shown in Figure 4 above, speaking to an HR representative was the third and fourth most popular avenue of people-based support. The interviewees discussed the nature of HR support in two main areas:

1. To seek **specific advice** about how to implement the organisation's HR **policies and procedures**.
2. To seek **more in-depth advice** about how to effectively deal with a **unique or ongoing people management challenge**, 'sense checking' of the manager's proposed approach and post-event reflection on challenging situations and identification of learning opportunities.

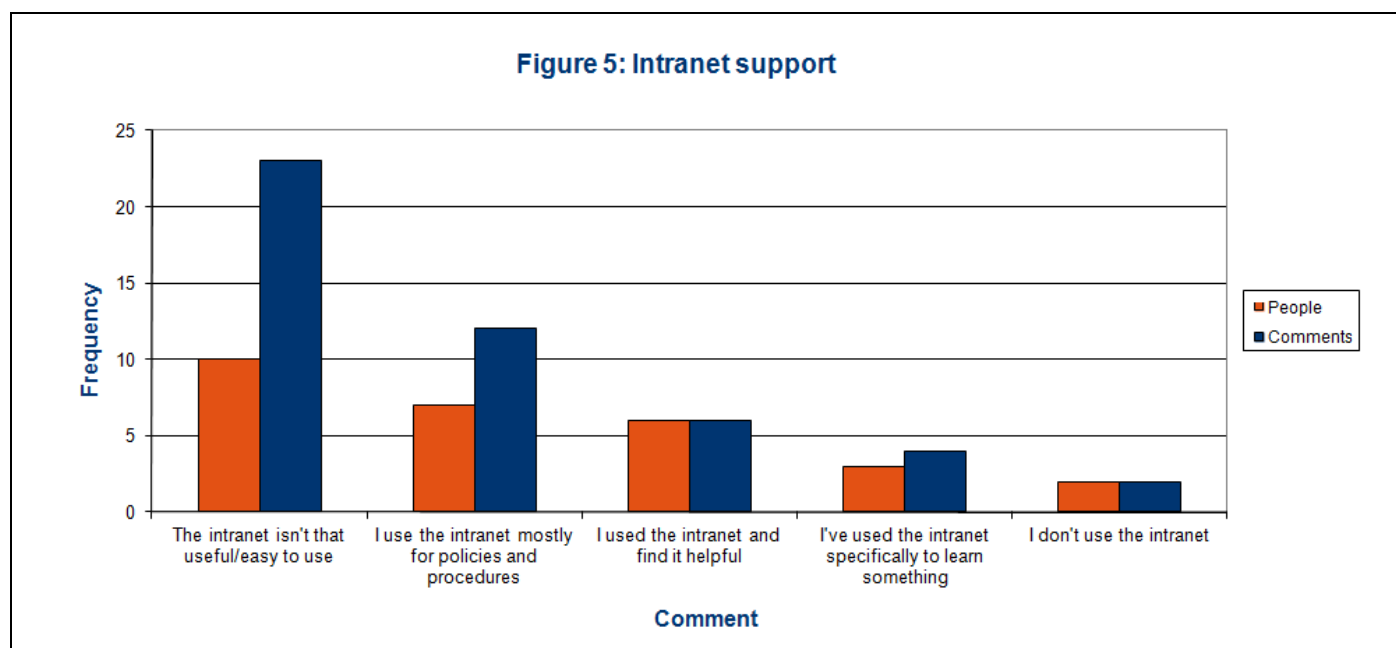
Both these areas received a considerable number of comments. 14 unique comments were received in relation to the first point – **procedural and policy advice** from HR. These comments were largely positive, with managers saying that it was helpful to talk through organisational policies they were unfamiliar with and get advice on how to implement them correctly and consistently.

18 separate comments were received in relation to the second, **more in-depth advice** that was received from HR. Most of these were also positive. For example, managers valued being able to talk through complex people management problems in confidence with a member of their HR team, particularly where they had limited experience of the issue in question.

Less positive comments about the nature of HR support related to issues such as the length of time taken to produce relevant paperwork in order to move case work forward, which often created delays. These delays often had a knock-on impact, making the manager's role more difficult. Also of concern (and this was particularly notable where managers called an HR call centre for advice) was the perceived lack of continuity with different HR representatives being involved in advising and taking cases forward.

4.3 Support from the intranet

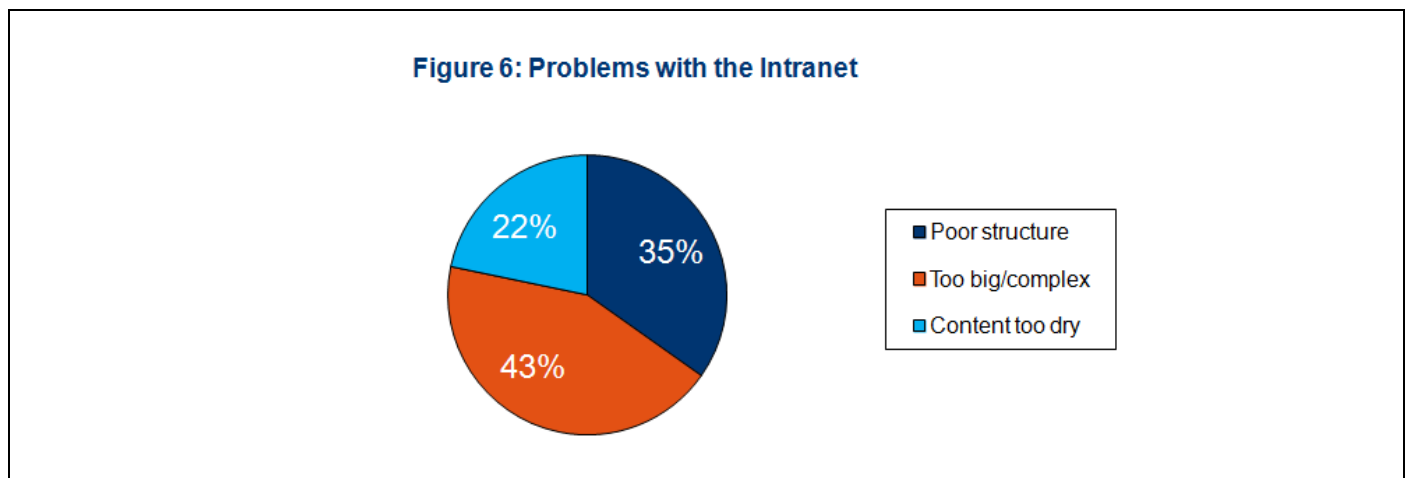
All of the eight organisations we spoke to had their own intranet facility, and these varied in size and complexity depending on the specific organisation in question. As shown in Figure 5 below, although the majority of interviewees said that they use the intranet regularly, when it comes to meeting the challenges of their role, the intranet was viewed much less positively than support received from other people.



For example, 28% of interviewees noted that their organisation's intranet was not particularly useful or easy to use. In comparison, only 17% said that their intranet was helpful and easy to use. 19% said that they used the intranet specifically to find information about their organisation's policies and procedures. 8% said they had used the intranet specifically to learn something and only 5% said that they did not use their organisation's intranet at all.

4.3.1 Problems with the intranet

Some interesting data emerges when we look in more detail at the negative comments gathered about the intranet. Figure 6 below gives a more detailed analysis of these comments, revealing the specific nature of the problems with organisational intranets.



For example, 43% of interviewee said that their organisation's intranet was **too big** and **cumbersome** to be useful. Interviewees described their intranet as an internal dumping ground for print publications or as a glorified electronic filing cabinet! 35% said that their intranet was **poorly structured**, which was often due to the ad-hoc nature in which it had been developed, with new sections being added with little thought as regards user-friendliness and ease of navigation.

Furthermore, 22% said that their intranet **content was too dry**, and focused heavily on processes and procedures. These interviewees felt that the content was often missing the 'real life' practical insights and how to apply theory in practice. Some interviewees said that the content was often **poorly written**, and in many cases had not specifically been developed for intranet/online use. Others mentioned a lack of interactive or multimedia features, and felt their intranet would benefit from interactive quizzes and self assessments, as well as audio and video content.

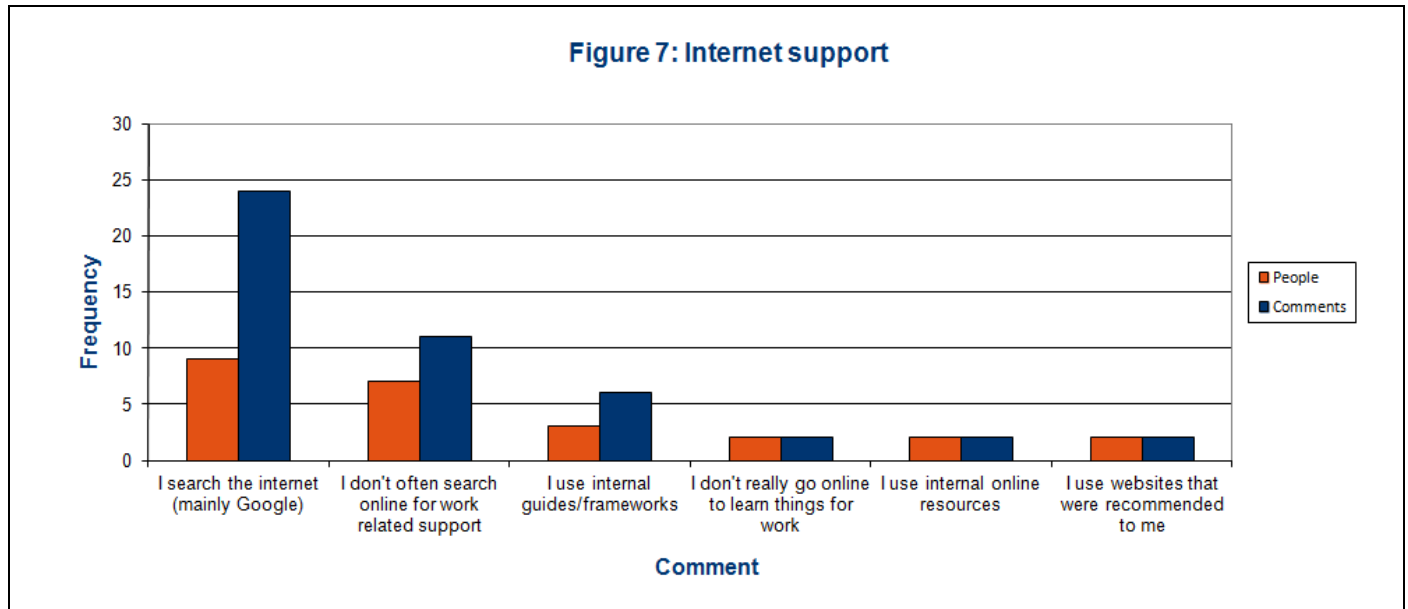
4.3.2 Measuring intranet effectiveness

Given the nature of the negative comments made in relation to overall intranet usability and effectiveness, it makes sense for organisations to measure the effectiveness of their intranet provision, by engaging directly with end-users. These results show that despite the significant investment many organisations make in developing their corporate intranets for learning, they are often poorly designed, and can be perceived as unhelpful and difficult to use. Jakob Nielsen, a recognised authority on intranets, counsels organisations on how to get the best from their intranets. He advises paying close attention to your intranet's initial design specifications, conducting in-depth user testing and regular reviews of your intranet's effectiveness.¹⁰

¹⁰ For more information about Jakob Nielsen and the Nielsen Norman Group see <http://www.nngroup.com/services/> (April 2012).

4.4 Support from the internet

As shown in Figure 7 below, the interviewees made a number of comments in relation to using the internet to meet the challenges of their role. 25% said that they regularly use the internet to search for information to help them with the challenges of their role. Google was the most frequently mentioned search engine. 19% said that they didn't often go online to search for work-related support, rather that they used the internet for personal reasons (e.g. such as booking a holiday or researching insurance options).



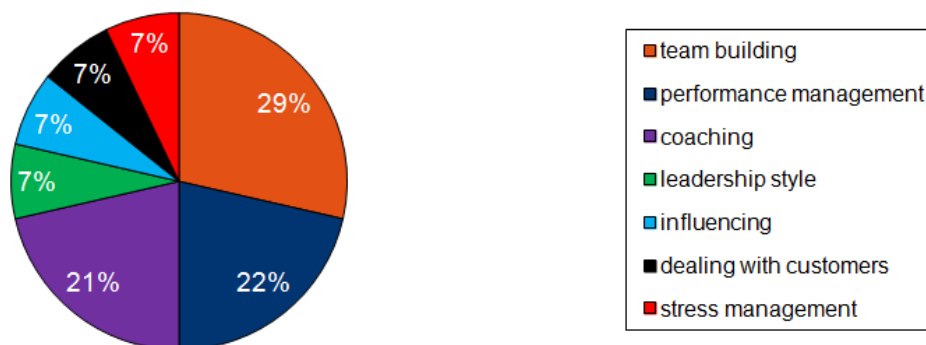
A closer examination of these responses (where people specifically mentioned they did not search online) revealed that this was due to an individual's preferred approach to learning. These individuals preferred to talk through problems and challenges with someone in person, rather than looking up information via secondary sources such as books or online. 8% said that they used internally provided frameworks and guides to help them in their role (e.g. competency or leadership frameworks), and 5% said that they looked at external websites that had been recommended to them by colleagues or peers.

4.4.1 How managers use the internet

24 separate comments were made about using the internet to search for work-related tips. Figure 8 below takes a closer look at the specific areas that managers use Google to get support for. The most popular topic was ‘team-building’, which was mentioned by 30% of the managers we identified who use the internet regularly. These managers were specifically looking for exercises to run with their teams, such as ice-breakers and Myers-Briggs type indicator assessments.

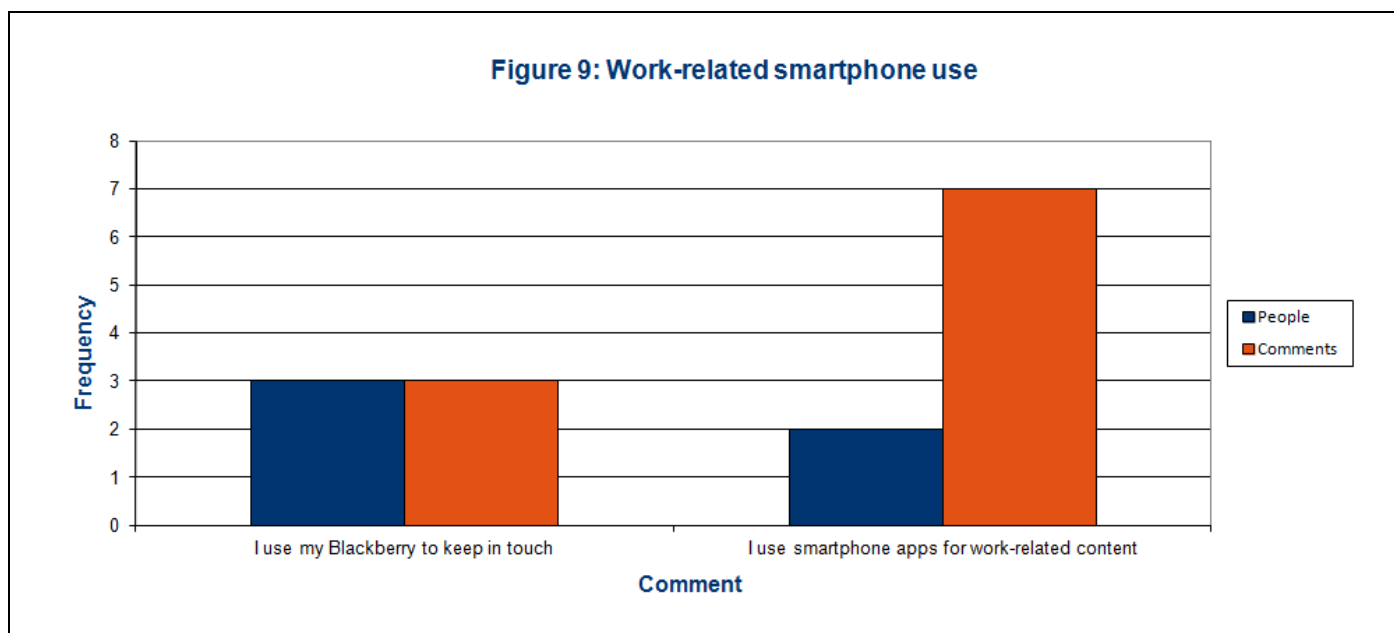
The next most popular topics were ‘performance management’, and ‘coaching’ which were both highlighted by 21% of the managers in this section. Those searching for information on performance management specifically wanted tools to help them deliver a successful one-to-one meeting. Those looking for coaching resources wanted to find out about specific coaching techniques such as the GROW model and how to use it effectively in practice.

Figure 8: What managers search for on Google



4.4.2 How managers use smartphones

As shown by Figure 9 below, a small number of managers mentioned the use of smartphones, such as Blackberrys and iPhones, both to keep in touch throughout the working day, and also to search for work-related content. A number of specific smartphone applications (apps) were mentioned, including general news sites, and more specific management focused sites.¹¹



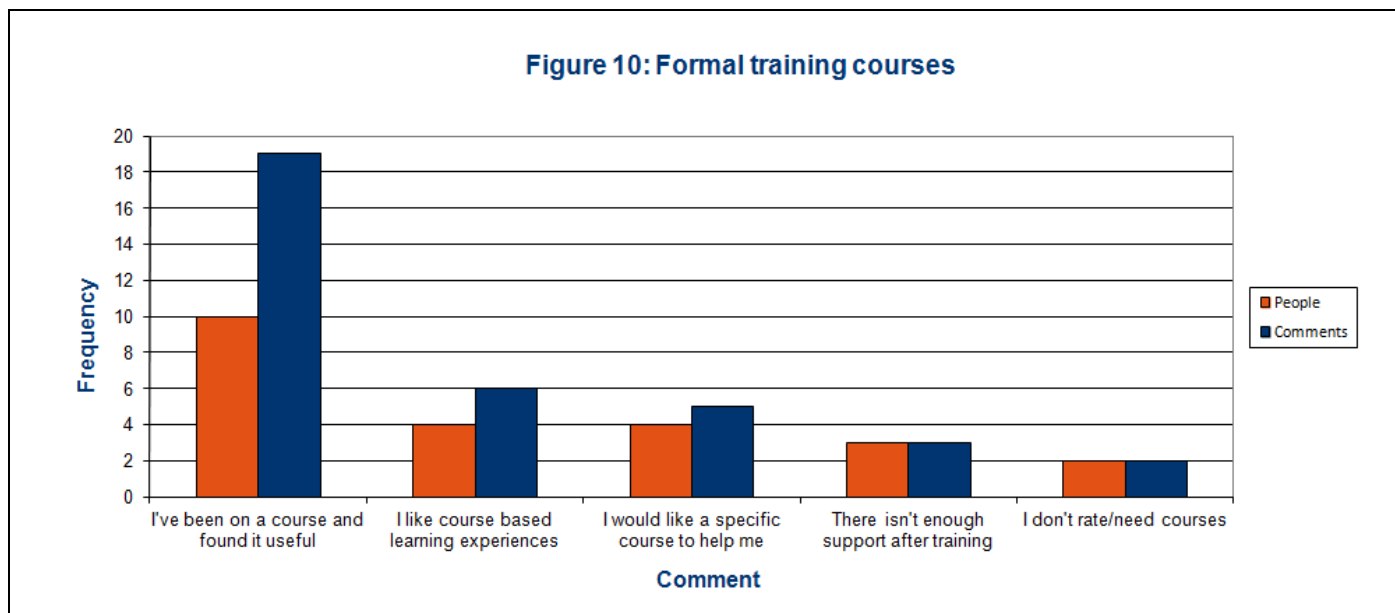
This is an area worthy of further investigation, particularly as research shows that mobile devices are used extensively in an informal learning context by experienced users.¹² In the workplace, smartphones are not only being used to support and enhance existing informal learning activity, but also to convert unexpected or unforeseen events into learning experiences, by accessing relevant content and collaborating with others.

¹¹ Specific apps and sites mentioned included the Times Higher Education, Management Today and the GoodPractice Top Tips for Managers app.

¹² G. Clough, A.C. Jones, P. McAndrew and E. Scanlon, 'Informal Learning with PDAs and smartphones', *Journal of Computer Assisted Learning* (2008). Available at: [http://csnotes.upm.edu.my/kelasmaya/web.nsf/0/d82e709c4661ce464825766400365c4d/\\$FILE/34168972.pdf](http://csnotes.upm.edu.my/kelasmaya/web.nsf/0/d82e709c4661ce464825766400365c4d/$FILE/34168972.pdf) (accessed May 2012).

4.5 Attitudes and perceptions towards formal courses

As illustrated in Figure 10 below, a range of comments were made by the interviewees in relation to formal training courses. Only 5% people said that they didn't rate or need course-based learning experiences. However, 28% said that they had been on a course recently and had found it helpful. A further 11% said that they liked course-based learning experiences. On a slightly negative note, 8% said that their organisation did not offer enough support post-training, and a further 11% said they felt they could do with a course to help them in a specific area, but it either wasn't available when they needed it, or it simply wasn't available at all.

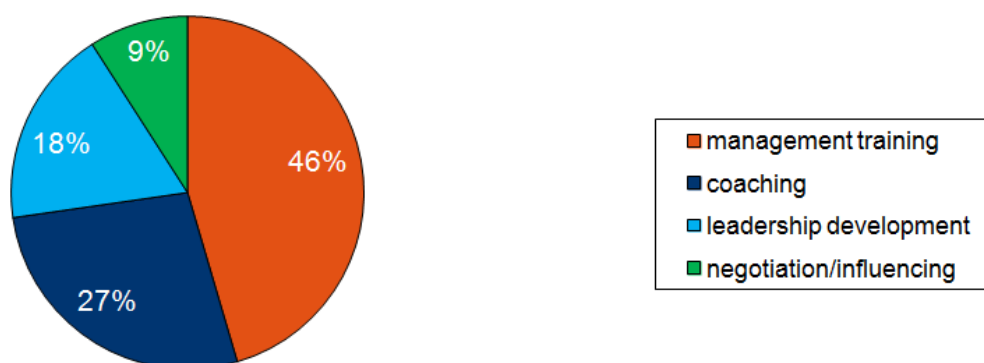


This shows that although formal training courses are still perceived to be of value by end users, as a learning tool they are not felt to be nearly as effective as the value gained from informal learning. When compared to other key support avenues mentioned during this study, the positive value gained from formal training courses is approximately equal to that derived from searching online for information. Both were highlighted as positive and helpful by around 28% of the survey sample.

4.5.1 Useful courses provided by organisations

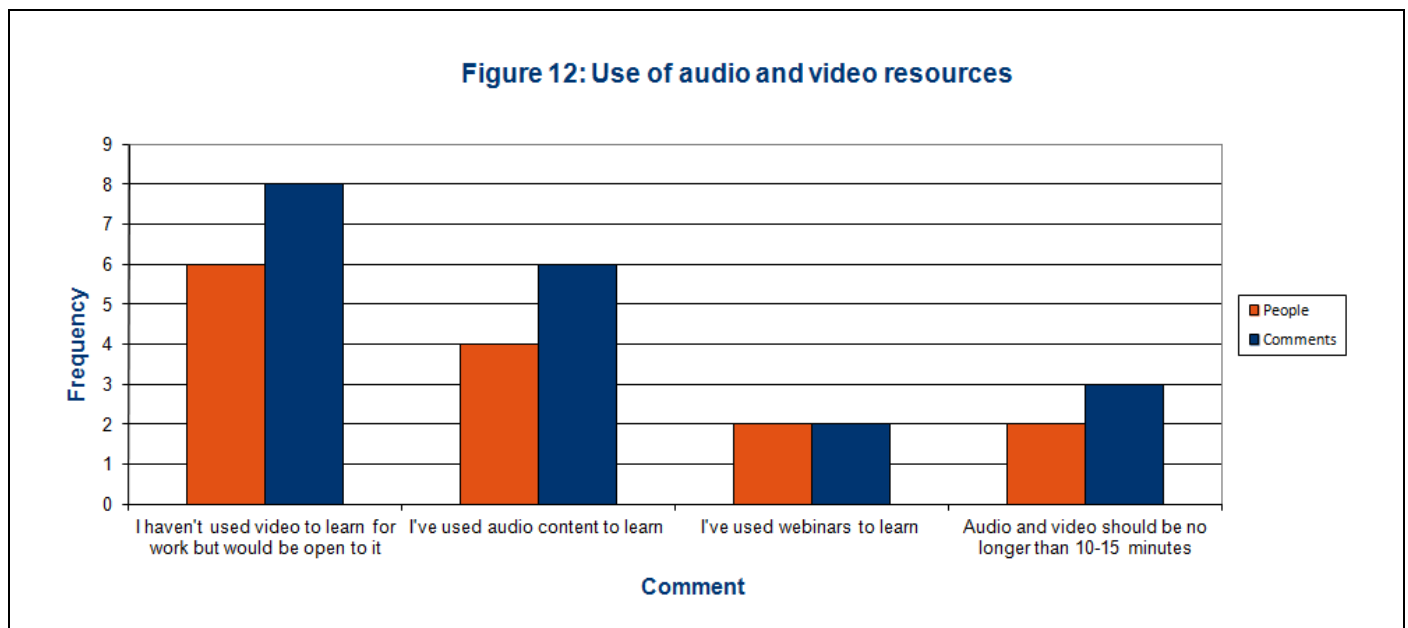
19 unique comments were made by the people who had been on a course and had found it useful. Figure 11 below looks in more detail at these responses. Of the people who talked about course content, 46% mentioned courses on management development. These were found to be particularly useful, both in terms of the content that was covered, but also in terms of being able to mix and share ideas and experiences with other managers. 27% said they had been on a coaching course and that they had directly benefitted from what they had learned, and had put this into practice with their teams. 18% of managers mentioned a leadership course and 9% a course on negotiation skills.

Figure 11: Formal courses breakdown



4.6 Attitudes and perceptions about using audio and video for learning

Figure 12 looks at how audio and video resources are used for learning. 17% of managers said that they hadn't specifically used video but that they were very much open to using it. This was because their organisation either didn't actively provide video tools or, where they did, they were not publicised and promoted enough to make people aware of them. 11% said that they had used audio for learning. All of the managers who used audio spoke positively about it as a tool to help them learn, but that the content needed to be relatively short and punchy, of no more than 10-15 minutes in length, otherwise they tended to lose interest. 5% people specifically mentioned that they used webinars as a tool to aid learning and talked about webinars they had attended on team-specific topics such as motivation and team cultures.



5. Conclusion

5.1 Why this report is different

Many studies concerning the effectiveness of organisational learning activity tend to focus on the views of a select group of senior HR, L&D and talent practitioners. However, the *Leaders and Managers Insights* study has taken a different approach by focusing on the tangible learning experiences and perceptions of a core group of learners, namely managers of people. When it comes to measuring the effectiveness of your organisation's overall learning provision, gathering in-depth qualitative feedback data from a specific group of end users provides a more credible starting point for analysis and debate about learning needs and evaluation.

5.2 Summary of results

This research aimed to identify common themes in relation to the key challenges that managers of people face, where they go for advice and support to help them in their roles and whether this support is effective in improving their overall performance. The biggest challenges faced by the managers we spoke to relate to **having difficult conversations** with their team members, followed by **managing capability** and **(under) performance**, followed by **coaching** and **training** of team members. As expected, there was considerable variation in the nature of manager challenges faced in the different organisations which made up the survey sample.

To help meet the demands of their role, managers have a variety of support options available. These include approaching **people** both from within their own organisational networks as well as external professional contacts, the use of various technology-based **internal tools** such as the intranet and job specific guides and frameworks, and seeking support from the **internet** (via both PCs and smartphones) using different search engines to access content-specific sites. Managers spoke of a preference for informal face-to-face or telephone discussion of problems and challenges that they faced. They also mentioned the benefits of speaking to their peers and sharing their experiences and best practice.

5.3 Next steps for your organisation

This report presents your organisation with a number of opportunities for further investigation and research. Most importantly, it should prompt a review of the current methods that an organisation uses to:

1. Identify the specific learning needs of key groups of learners.

This research has shown that systematically asking employees about the challenges and problems they face in the course of their day-to-day roles is an effective way of uncovering potential development needs in a target population of learners. It can also help to uncover important information about learners' attitudes and assumptions towards the different learning tools and interventions that they have directly experienced.

However, a qualitative approach with a small sample can only indicate areas that are worthy of further investigation. It tells you the right questions to ask, but won't provide solid evidence without combining it with other techniques.

A rich qualitative assessment forms one part of a broad, systematic learning needs analysis that can include one or more of the following approaches: ¹³

- a **targeted survey** across a cross-section of employees, informed by the qualitative analysis
- a **review** of the **development plans** for a sample of the target population
- a **review** of **search terms** entered into your organisation's LMS and/or intranet
- a **review** of **business plans** for key areas in the organisation
- a **review** of **key business metrics and trends**

While carrying out all of these activities might be unnecessary, a **learning** and **performance needs analysis** should be thorough, since it forms the basis of an effective budget allocation.

2. Determine the overall effectiveness of your learning provision.

Perhaps you already gather some form of feedback from your end users, such as post-event evaluation questionnaires or online feedback surveys. However, this type of evaluation may not give you a complete picture of the effectiveness of your overall learning and performance support provision in meeting the needs of your employees. As the *Leaders and Managers Insights* report shows, taking an in-depth look at the preferences and perceptions your employees have about learning can be the starting point for a realistic assessment of your current learning provision.

3. Further suggestions

The research approach outlined in the methodology section of this report provides a useful template that can be adapted for use within your own organisation. In using this approach it is useful to have the following suggestions in mind:

¹³ A more comprehensive summary of how these techniques can be used can be found in the following blog post by Owen Ferguson: GoodPractice's Director of Product Development 'Learning needs analysis: some useful techniques' (January 2012), Available at: <http://goodpractice.com/blog/learning-needs-analysis-some-useful-techniques>.

- Have a clear understanding about **what you want to find out** from the outset.
- Ensure that interview questions **don't lead the interviewee**, and are phrased to uncover information about actual behaviour, rather than intended behaviour: i.e. ask about what employees **do** when faced with challenges, not **how** they learn.
- Try to eliminate bias wherever possible.
- Work with what the interviewees have **actually said**, rather than the interviewer's **interpretations**, wherever possible.

By first identifying the specific learning needs of learners and then following this up with an exercise to determine the effectiveness of learning provision in these areas, your organisation will be better able to respond to the real (rather than the perceived) learning needs of employees.

5.4 Work with us

GoodPractice develops and delivers high quality content designed to improve the performance of leaders and managers. Over a million users in more than 200 companies, public bodies and learning organisations are using GoodPractice to make the most of their skills and talents.

At GoodPractice we are committed to sharing our experiences and helping organisations across all sectors of industry to improve the effectiveness of their learning provision. If you are responsible for designing and delivering learning in your organisation, why not get in touch with us to find out how we can help improve your approach. Visit our website www.goodpractice.com for more information and resources.

6. Appendices

Appendix 1 – About the research sample

A range of client and non-client organisations were initially identified and invited to participate in the *Leaders and Managers Insights* research project. Eight separate organisations of differing sizes from across the public and private sectors were involved. These included two large financial institutions, a brewing company, a county council, a broadband and telecommunications provider, a legal services provider, a university and a motoring membership organisation.

Once agreement to participate was confirmed, target groups of managers within each organisation were identified and interviews with a member of the GoodPractice project team set up. A total of 36 one-to-one telephone and face-to-face interviews were conducted throughout June and July 2011. A minimum of two managers took part per organisation.

The small sample in this research reflects its qualitative nature and is intended to inform a broader, more quantitative analysis approach. It highlights areas worthy of further investigation and should be viewed as a companion to the results reported in other GoodPractice research including *The People and Performance Link: How Managers Learn (in their own words)*¹⁴ and *The People and Performance Link: Challenges of Being a Manager (in their own words)*.¹⁵

¹⁴ Peter Casebow and Owen Ferguson, *The People and Performance Link: How Managers Learn (in their own words)*, GoodPractice Research Report (January 2012). Available at: <http://goodpractice.com/blog/resources/how-managers-learn-in-their-own-words-white-paper/>.

¹⁵ Peter Casebow and Owen Ferguson, *The People and Performance Link: Challenges of Being a Manager (in their own words)*, GoodPractice Research Report (April 2010). Available at: <http://goodpractice.com/blog/resources/the-challenges-of-being-a-manager-in-their-own-words/>.

Appendix 2 – The interview process

To gain an understanding of the key elements of each manager's role, the interviews followed a semi-structured framework which was developed by the project leader with specialist input from Nigel Paine.

The interview approach primarily focused on uncovering the key elements of each manager's role, and the typical challenges, issues and difficulties they face. A variety of open questioning techniques were used to establish where managers go for support and information (both within their organisation and externally) and the impact they feel this support has upon their overall performance.¹⁶

The interview questions were deliberately constructed to ensure that they did not guide or lead the interviewees in any particular direction. During the interviews, additional prompting and probing questions were used at the interviewer's discretion to draw out further details as appropriate. Throughout the interview process, managers were asked to discuss the behaviours and actions they took in real situations, rather than giving a conceptual interpretation of what they 'would do' in a hypothetical situation.

The interview framework was piloted during initial interviews, and interviewers reported their experiences back to the wider project team. It was agreed that no amendments to the interview framework were required.

¹⁶ Examples of the questions used include: *'Talk me through a typical day for you as a manager, can you describe the range of activities that you are involved in?'* and *'When you are faced with a new or unfamiliar challenge in your role, where do you go for support?'*

Appendix 3 - Research theme identification and content analysis

The following steps were taken to determine relevant research themes and conduct a thorough analysis of the data:

1. All interviews were recorded (using a digital recorder for face-to-face interviews and Skype compatible recording software for telephone interviews).¹⁷ Interviews were then transcribed in full and anonymised.

2. Once the interview stage was completed, a small cross-section of transcripts was randomly selected to be used in an initial **card sort exercise**, run by two members of the project team. To reduce subjective bias, this included the project leader, who had not been involved in conducting the interviews. Transcripts were broken down into discrete comments. As the card sort exercise progressed, comments were analysed individually and organised into broad groupings. From these groupings, the following three main research themes began to emerge:

- **Research Theme 1: job and organisational context.** Comments in this theme largely relate to each manager's specific job role and responsibilities, their team and their organisation.
- **Research Theme 2: challenges faced in the manager's role.** Comments in this theme related to the sorts of issues and problems managers faced in their roles on a regular basis.
- **Research Theme 3: actions when faced with a challenge.** Comments in this theme focused on the specific behaviours and actions that managers demonstrated in order to meet the challenges of their role.

During the card sort exercise, each unique comment was assigned to an appropriate theme.

3. After the initial card sort exercise was completed, the rest of the project team came together to conduct a second, more in-depth card sort exercise of all remaining interview transcripts. During this process, the three initial themes became more detailed, and the team was able to segment and code the responses further within each broad theme. An example of the segmentation approach used for **Theme 3: Actions when faced with a challenge** can be found in the *Theme 3 Segmentation: actions when faced with a challenge* table below.

4. All data gathered from the 36 individual interviews was then exported into a Microsoft Excel spreadsheet. Qualitative research techniques, including keyword frequency analysis and manual coding of data, were used to identify significant trends and key findings within each of the three research themes. As part of the data analysis process, both the number of people who commented on a specific issue as well as the number of comments made in relation to that issue were recorded. To reduce subjective bias this process was undertaken independently by two members of the project team. The project team members then met to compare their results and agree upon the report findings.

¹⁷ On average, each interview lasted between 45 minutes and one hour.

Theme 3 Segmentation: actions when faced with a challenge

The following list shows the full range of manager comments that were received in relation to the question “When you need help with a new or unfamiliar challenge at work, what do you do?” and subsequent supplementary questions that followed on from this:

- I don't rate/need courses
- There isn't enough time to learn/get support for learning
- There isn't enough support after training
- I subscribe to relevant email newsletters to keep up to date/discover useful content
- I search the internet (mainly Google)
- I don't really go online to learn things for work
- I don't often/ever search online for work related support
- I get value at work from social media tools
- I've been on a course & it was useful
- I have used audio content to learn
- I use websites that were recommended to me
- I've used webinars to learn something
- I haven't used video to learn for work but I would be open to it
- I would like a course on [x] to help me
- I like course based learning experiences
- I speak to people (in general) i.e. not specified
- I speak to people outside my organisation
- I speak to my internal network
- I speak to a subject expert
- I speak to other managers
- I speak to my boss
- I speak to L&D
- I speak to HR (about process and procedures)
- I speak to (HR general)
- I speak to a mentor/coach

- I use the intranet (generally positive)
- Our intranet isn't that great/useful/easy to use
- I don't use the intranet
- I use the intranet mostly for policy and procedures
- I've used the intranet specifically to learn something
- I use internal online resources
- I use internal guides/frameworks
- I do not like reading things to learn for work
- I use smartphone apps for work related content
- I just use my blackberry to keep in touch
- I like to read something [first] to keep up to date/learn something
- I tend to/like to learn by doing

Appendix 4 - Full list of manager challenges

1. Having difficult conversations	18
2. Managing capability/performance	12
3. Coaching/training my team	10
4. Resistance to organisational change	8
5. Managing remote teams	8
6. Motivating my team	7
7. Managing absence/sickness	6
8. Giving negative feedback	6
9. Recruitment	4
10. Managing my time effectively	4
11. Volume of emails	4
12. Number of internal systems/paperwork	4
13. Volume of internal meetings	3
14. Meeting sales targets	3
15. Covering for other managers	2
16. One-to-one meetings	2
17. Negotiating and influencing	2
18. Employee engagement	2
19. Developing commercial awareness	2
20. Dealing with stress	2
21. Conflict management	2
22. Meeting deadlines	1
23. Keeping up with internal communications	1
24. Delegating	1
25. Developing people	1
26. Dealing with disciplinary issues	1

Appendix 5 – Analysis of manager challenges by sector

Manager challenges in the banking sector

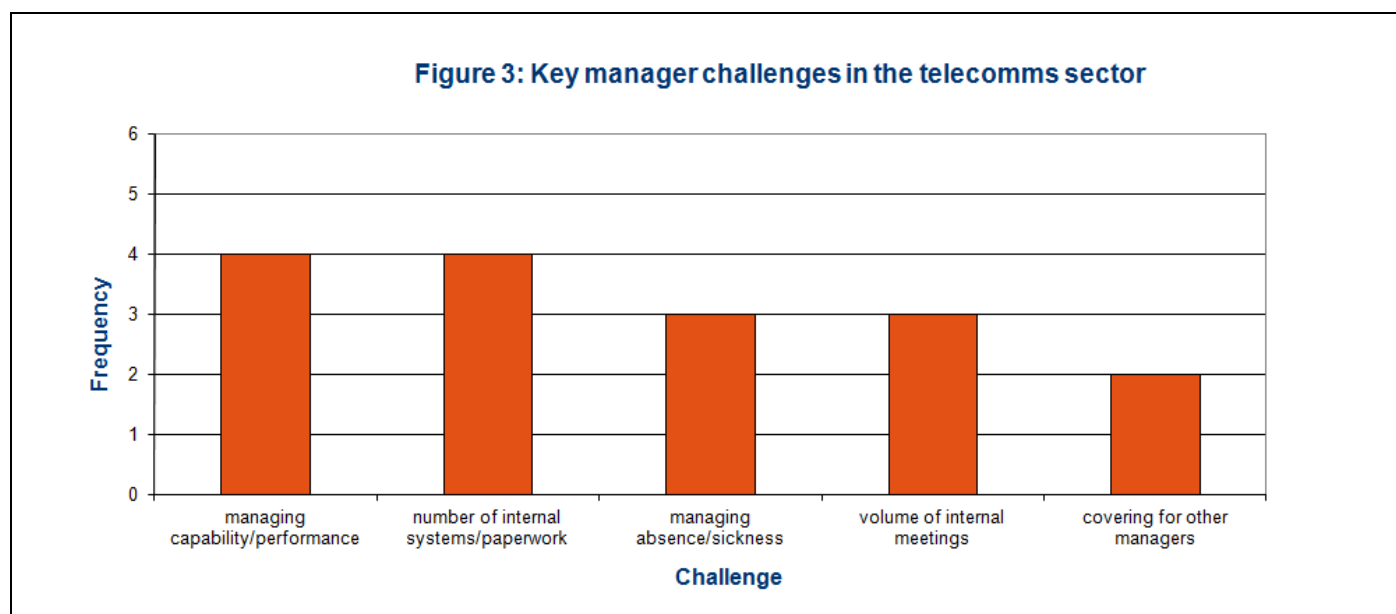
As highlighted in Figure 2 below, managers from the two large **financial institutions** said that **resistance to organisational change** and **having difficult conversations** were the biggest challenges they faced. Both were mentioned by 100% of the banking survey sample. **Coaching** and **training** of team members and **managing capability** and **performance** were also identified as important issues for this sector in particular, with each issue being raised by 67% of the banking survey sample.



The comments from banking sector managers about **difficult conversations** and **resistance to change** were made against a backdrop of large-scale organisational restructuring and re-organisation, as well as redundancies and altered team structures. For the banking sector, these issues are reflective of the challenging economic environment, and the need to cut costs and streamline all areas of the business. The managers we surveyed often found themselves at the sharp end of organisational change, and are tasked with delivering difficult news (whether it is in relation to restructuring, redundancies or underperformance) to their team members.

Manager challenges in the telecommunication sector

As shown in Figure 3 below, a range of different management challenges were reported by managers in the **broadband and telecommunications sector**. In this particular sample, managers were most concerned about **managing the performance and capability** of their team members, as well as the **volume of internal systems and paperwork** associated with their role. Both these issues were raised by 67% of managers in the broadband and telecommunications sample. This can be considered as typical of a call centre environment, with its inherently strong focus on performance monitoring of employees and meeting clearly defined targets.



Manager challenges in the motoring membership sector

Managers from the **motoring membership organisation** highlighted that the primary challenges for them were around **recruiting effective salespeople** and **managing a remote or virtual team** effectively. Managers from the brewing company highlighted **coaching** and **training** of team members as a key challenge, together with **managing performance** and **capability**.

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