



LEARNING ON THE FLY[®]: REAL TIME, JUST IN TIME LEADERSHIP DEVELOPMENT

A REPORT ON EDA'S FUTURE LEADERSHIP ROUNDTABLE

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INTRODUCTION

It is widely recognized in today's fast paced world, that learning how to learn, and keenly applying that skill to everyday work challenges, may be one of life's most important capabilities. The purpose of the November 2001 Future Leadership Roundtable, **Learning on the Fly[®]**, was to understand the learning realities and challenges executives face in today's fast paced, complex world and discuss and explore tools, resources and technologies for helping executives to develop and learn at their place and time of need.

The **Learning on the Fly[®]** Roundtable was the third in a series organized by Executive Development Associates (EDA) as "think tanks" to push our vision beyond the horizon to examine critical, emerging business challenges and the implications for leaders and leadership development. EDA is a leading consulting firm specializing in the use of executive development to help companies achieve their strategic objectives. Agile Technologies hosted the Roundtable and sponsors included Amgen, The Financial Times Knowledge Dialogue, Healthy Companies International, Agile and BTS.

The Roundtable was truly a unique experience. The combination of a real-life story of a CEO's growth in leading a company (Ned Barnholt, CEO at Agile), the frustration in projecting ourselves 10-20 years into the future (scenario planning), the dialogue around best practices with seasoned practitioners and the hands-on exposure to current solutions, provided the catalyst for great new ideas for helping executives learn at their point and time of need.

This paper brings the meeting full circle by sharing reflections on the Roundtable experience and some insights that have emerged following the event.

OUR APPROACH

EDA believes that the richest resource for advancing learning is in dialogue with best-in-class peers (really smart people), and through a discovery driven approach. Therefore, the meeting design featured an intimate, informal, dialogue rich format limited to 35 select participants and guest experts.

A custom website provided by EDA, supported networking, sharing and communication before and after the Roundtable. The Roundtable presentations and data captured from the event's lively discussions (using Strategic Illustration provided by Janet Schatzman) were posted on the website for participants to reference. The topics discussed and solutions shared during the day and half meeting are reviewed in this paper.

"...discuss and explore tools, resources and technologies for helping executives develop and learn at their place and time of need."

ROUNDTABLE SESSION HIGHLIGHTS

Learning and Growing in the CEO Role

Our keynote speaker, Agile's CEO Ned Barnholt, set the tone for this experience revealing his learning and growth as CEO of the biggest IPO in Silicon Valley history. Captivating roundtable participants, Ned shared his real world lessons as CEO on how an individual executive leader can meet today's business challenges and rapidly learn and grow:

- *As far as Leadership style goes, one size does not fit all.* "Style" refers to how a leader makes decisions, works with other people, expresses or presents himself or herself in different situations, work habits, and communication preferences.



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- *Every interaction is an opportunity to understand yours' and someone else's style.* Constantly observing yours' and other's styles will lead to knowledge of a leader's strong points and areas of weakness – yourself included! For leaders, the goal is to build on those strengths and use them in ways that maximize their ability to achieve goals and help either improve weaker areas, or compensate for them.
- *Understand others.* The better you understand all facets of someone you work with, the greater the contribution you can make.
- *Become a trusted, even indispensable, advisor to the people you support.* Ned's suggestion here is always to be substantive; don't shy away from tackling the complexities of a business, technology, or organization.
- *Focus on the big picture AND the details.* Put results ahead of process.
- *There is no more powerful weapon in a leader's arsenal than self-awareness.* You can make an invaluable contribution if you can help people not only understand themselves better, but apply that understanding to their roles as leaders. Greater self-awareness is how leaders grow within their jobs and become better at what they do.

“Ned Barnholt set the tone revealing his learning and growth as CEO of the biggest IPO in Silicon Valley history.”

The Future of Executive Learning: Forces, Scenarios, Implications & Ideas

It is limited, at best, to prematurely converge on solutions for today without first expanding our thinking on the possibilities for how executives will learn in the future. This was the purpose of the scenario planning segment. Jennifer Jarratt – Futurist, Coates & Jarratt, engaged us in an accelerated scenario planning process.

In this segment we learned some basic tools for scenario planning and then used them to explore the

drivers of the future for executive learning. First, we viewed the forces and patterns of the past 10 years to understand how this has influenced our decisions of today. Then we explored future drivers, sketched scenarios of the future, and challenged our thinking on those alternative paths to executive learning that we might take in the future. The comprehensive large-group output is posted to the Roundtable website for participant reference. Please visit www.lof.roundtables.edanetworks.com to view all of the Roundtable's captured data. The output of this segment was used as input for the Marketplace for Ideas exercise (described on page 4) to develop new ideas on the second day of the Roundtable.

“Elective sessions provided hands-on experiences with innovative learning on the fly tools, resources and technologies.”

Highlights from the scenario planning segment included these drivers:

- There will be a changing work contract with employees. Individual contributors are looking for more fulfillment and purpose in their lives and work.
- There will be an increased responsibility of corporate leaders to extend beyond business results into the social and political arenas.
- Work will be greatly impacted by technology and speed (i.e., the rate at which we receive information).
- The values of the younger workforce will vary and this will impact our future leaders. For the first time ever, we now have four generations of workers in the workforce.
- There will be a great disparity in comfort with technology and the access to it.
- There will be more personal control over learning, e.g., amount and selection of content, when and where learning takes place, etc.

A special note of appreciation to our four *Agent Provocateurs*. Essentially their task was to provoke



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our thinking during the table group work, to ensure that each small group did not become too limited by their current views, and to encourage even more divergent thinking. The Agent Provocateurs included:

- John Cone, Former VP, Dell Learning, Dell Computer
- Jim Matthews, President and COO, Healthy Companies
- Marshall Goldsmith, Executive Director, Financial Times Knowledge Dialogue (Now President, A4SL Coaching)
- Francine Hunt, e-Learning Strategy, BTS Interactive

“...our four Agent Provocateurs task was to provoke our thinking.”

Learning Lab Experiential Tracks

A six-track learning lab of elective sessions was provided to expose participants to hands-on experiences with innovative learning on the fly tools, resources and technologies.

The blend of tracks was selected to map across the four elements of a comprehensive learning model: personal learning strategies, learning from day-to-day experiences, learning at the point and time of need, and extending learning beyond the classroom walls. The Labs included the following:

- **The Financial Times Knowledge Dialogue.** In this session participants experienced a live coaching dialogue with Marshall Goldsmith. Sessions like the one experienced are typically held via videoconference technology with the user’s choice of more than 70 “gurus”.
- **BTS Interactive Learning.** This session covered BTS’ solutions to helping executives and employees learn business acumen and how to run a profitable business using business simulations (workshop-based and online).
- **Harvard’s Leadership Transitions.** Harvard Professor, Dr. Michael Watkins

- conducted a videoconference discussion on his 8-step framework for executive transitions and demonstrated this new learning tool. The framework focuses on taking charge in new executive leadership roles and provides content, assessments and tools to accelerate the transition and ensure the success of new leaders moving into top management positions.
- **Healthy Companies’ Global Leader Online Learning.** This session focused on the ability of leaders to assess where their organization is (and they themselves are) regarding globalization and where it needs to go. Online assessment technology and several case studies were shared to demonstrate an approach which enables clients to mobilize their companies for better global business results.
- **Leadership Labs’ Leaders As Teachers.** Participants engaged in facilitated dialogue to reflect their personal experiences through storytelling and leading through teaching. During this session participants experienced the initial module of a LAT program and enjoyed a real-time visual capture of their work using Strategic Illustration. The output from these sessions can be viewed on the LOF website at: www.lof.roundtables.edanetworks.com
- **Fort Hill Company’s Friday5s/Monday Manager.** A new finish line for learning was drawn in this session. This session offered use of breakthrough technology that supports leadership learning and development by helping users set track development goals/action plans over time. For six weeks after the Roundtable, each participant had the chance to use the Friday5s web-based tool to extend the learning period beyond the Roundtable. A summary of this experience is offered later in this report.

Personal Learning Strategies

A personal learning strategy (PLS) is an individual leader’s plan for how they are going to optimize their learning on a day-to-day basis. The learning is



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...tied to the success of the individual and the learning is primarily “on the job”.

An effective Personal Learning Strategy includes four main elements: 1) Identification of a current challenge, 2) Description of what future success looks like, 3) Awareness of who I am, 4) Definition of key capabilities needed to make an incredible business difference. The outcome is an action plan to increase learning and development.

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Participants explored perspectives and ideas on the best, practical ways to consistently make a personal learning strategy happen for today’s executives. Our goal was to identify an array of approaches. Some of the ideas generated included:

- Start with an image, personal aspiration or goal in mind. Identify what/why you need to learn: Ask, what do I need to change about myself to become more effective? Identify the focus or “payback” areas, the content or context expertise required, and the gap or sense of dissatisfaction with where you are.
- Use knowledge about your own personal learning style and preferences to customize your approach. Develop a plan around your learning style and adjust it as you proceed.
- Create a process to identify leadership behaviors that are exemplary.
- Be in the room at the table in the “critical path” of the dialogue around real business strategy issues. Then find a business problem and solve it.
- Make your learning objectives/challenges public.

- Identify a role model to tell you how he or she learns.
- Use a “coach” to support your development.
- Incorporate a reflections process systematically during all meetings and throughout the day.
- Add “key learnings” to your to-do list.
- Get an executive to champion or teach something.

The Marketplace for Ideas

With fresh perspectives from the previous day’s scenario planning segment, table groups engaged in lively brainstorming sessions to arrive at new ideas and innovative practices to help executives learn on the fly in the future. Each team’s task was to arrive at their best seven ideas and then sell those ideas to the other table groups. Teams “sold” and tested their ideas to the other groups, gathered feedback, learned and refined their top ideas and competed to capture the ultimate winning solutions. Fun!

“Develop a Learning Concierge or navigation tool to enhance personal and business effectiveness.”

After completing the competition, the table teams regrouped to discover what they had learned, review the feedback and further improve their ideas. The following are the top three “winning” ideas for helping executives to learn on the fly in the future:

- Develop a Learning Concierge or navigation tool to enhance personal and business effectiveness. The Learning Concierge would be designed to take an executive’s question and search a databank to arrive at developmental content and solutions to guide their learning and actions.



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- Create a Learning Calendar where each day signals a different aspect of a personal learning strategy. The Learning Calendar is intended to “trigger” some reflection time to focus on learning goals and action steps. It would push to the individual, development information needed, e.g., if their calendar indicated they have a performance appraisal session coming up soon, they might get tips on the 5 most important steps to ensure an effective appraisal session with an employee.
- Follow six willing executives for 2 weeks and design learning strategies that fit their learning patterns. Create a video that encapsulates their “leadership learning” approaches.

LEARNING BEYOND THE PROGRAM: FOLLOW-THROUGH ACTIONS AND RESULTS

As part of the **Learning on the Fly[®]** Roundtable, participants had the opportunity to get first-hand experience using Friday5s – a new, web-based tool developed by the Fort Hill Company, for helping leaders turn learning into action. Each individual identified one or two actions that they wanted to take as a result of something learned at the Roundtable and wrote out goals to be traced in the Friday5s system. On selected “triggered” Fridays, for six weeks after the Roundtable, participants were sent a link to a website that was pre-loaded with their specific personal goals. In about five minutes (hence the name, Friday5s) they input comments to the following questions:

1. What is the best result you have achieved based on your goal?
2. What is the next step you plan to take and the expected impact?
3. What is your most important insight/discovery about learning on the fly?
4. What challenges are you experiencing as you execute on your goal?

Additionally, participants were able to designate one or more people as their personal coach. After each update, there was an option to send your coach(es), and/or manager, a copy for comments and suggestions.

“Each individual identified one or two actions that they wanted to take as a result of something learned at the Roundtable.”

The triggered questions were our mechanism to actively manage follow-through and not just leave it to chance. The tool created an effective learning community beyond the program experience, as all participant comments were visible to all others and it was easy to learn from each other’s experiences.

What Did the Users Say?

The following captures the key discoveries mined from the Friday5s’ community of learners as it relates to executing their goals:

- Learning on the fly doesn’t just happen by itself; it must be facilitated, encouraged and monitored.
- Time pressure! Just the competition with time on other projects, makes it hard to stay on learning.
- Learning depends on personal discipline. The discipline to pause, to reflect, to see things differently.

“...participants were able to designate one or more people as their personal coach.”

- Reporting short-term accomplishments on a longer-range goal is a challenge. We clearly see the impact of time crunch on learning and taking action. Follow-through is difficult to motivate after an event where setting and implementing a goal is optional. Despite the time crunch and the fact that these goals take time to



LEARNING ON THE FLY[®]: REAL TIME, JUST IN TIME LEADERSHIP DEVELOPMENT

accomplish, they demonstrated that it is possible to make real progress in a short period of time.

- Storytelling has an incredible impact and carries more meaning than a textbook, online learning, or bullet points on a power point presentation.

“...the time has come for architecting learning on the fly practices and tools into our executive/leadership development experiences.”

- Learning on the fly does not need to be e-Learning. Many options are available to help executives learn without using complex learning systems.
- Learning in a fast paced environment may need to be prompted. We can take a lesson from the scheduled classroom approach; with scheduled time, people attend. Using prompts such as e-mail may be an effective tool.
- We need to continue providing strong and simple blended learning solutions (combinations of integrated classroom and non-classroom learning experiences).
- There is a need to take advantage of existing learning opportunities in the workplace rather than only creating programs and classes.

CONCLUSION

The learning from the Roundtable had different implications for each of us, yet a common realization was that the time has come for architecting learning on the fly practices and tools into our executive/leadership development experiences, and our day-to-day work.

We have completed our third Roundtable event and the magic of the combination of the right process

and right people proved successful once again. Through these Roundtable discussions, we create and advance our ideas, gain deeper clarity and continue to contribute to growing and developing our leaders, our organizations and ourselves.

For more information about this and other Roundtables, email us at:

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About the Authors

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Jodi developed EDA's Learning on the Fly strategy. She is responsible for our leadership development methods and resources that help executives learn more effectively from their job experiences and at their point and time of need. Dr. Knox consults to build shared understanding and support for leadership development initiatives. She has consulted with leading global organizations such as Johnson & Johnson and UBS. Jodi has authored several articles on Action Dialogue, Action Learning & 360 feedback. You can reach Jodi at jknox@executivedevelopment.com Or phone: 212-744-3811.