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Targeted Instruction for Executive Education: Classifying Participants to Enhance Program Delivery

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Abstract

This paper addresses the imperative to assess executive education participant knowledge and skill/experience levels prior to program development so that programs better meet participant needs. As such, we provide a typology of participant types and develop strategies for providing an appropriate blend of instructor-centered and participant-centered course material to executive education participants. Our purpose is to present a blended view of executive education that allows for targeted knowledge and skill development for executive education participants within different learning environments and using different tools and methods of instruction.

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Introduction

Institutions which offer non-degree executive education programs often go to great lengths to develop a portfolio of courses which will serve the many and varied needs of their stakeholders (Aram & Noble, 1999). From open-enrollment courses on general business topics or trends to custom courses developed for a specific organization or purpose, there are a wide variety of offerings available to individuals and organizations that seek out these opportunities (Billington, 2003). However, we believe that much less effort goes into understanding the heterogeneous nature of the executive audiences who populate these programs. Given the diverse experiences and academic (knowledge) preparation of many participants in executive education programs, we believe that institutions which treat executive audiences as a monolithic group are missing an opportunity to offer more targeted educational programs that have an enhanced impact for individual participants. This paper is an attempt to develop a more informed understanding of the diverse nature of executive education audiences, and to suggest a blended model of non-degree executive education to better meet participant needs.

This situation is analogous to the situation encountered by MBA instructors as they prepare their coursework for MBA audiences — some students have sufficient knowledge and experience to engage in advanced graduate level business study, and some students have little knowledge/experience and are rather unprepared for graduate level business study. The instructor is placed in a tough position: teach at an advanced level and risk losing the less-well-prepared students, or teach at a more basic level and risk alienating the advanced students. Neither approach is optimal. What is needed then is an approach which makes use of a variety of instructor-centered and student-centered approaches to better target appropriate material to the appropriate students at the appropriate times. In executive education, as in MBA education, a blended model offers the potential for a more targeted approach because it provides for varying levels of instructor and participant-centered educational activities.

A Classification of Executive Education Participants

The suggestion that executive audiences are heterogeneous would seem to elicit very little disagreement; perhaps a more enlightening exercise would revolve around a discussion of how each audience member differs

and what those differences mean for providing executive programs that have impact and value equally for all participants. Prior to each executive education session, we send participants a short pre-program questionnaire which asks them about their education, development experiences and work experience. As with MBA education, we have found that participants in executive programs differ in terms of their academic preparation for business-related subject matter and in their experience in business environments. Valle (2006) refers to these dimensions of difference as *integration* and *context*. Individuals with a highly integrated view of business operations (due to experiences with formal and informal business education) are able to see the connections between the functional areas of their business operations, to *see* the parts as a fundamentally strategic whole. Their academic preparation has afforded them the opportunity to study the functional subjects in depth, and that depth has provided them with a solid platform for developing a breadth of understanding across the various business disciplines. Individuals develop an understanding of the context of business activities through skill development honed over years of practice (due to experience in various organizational roles, and at progressive levels of responsibility); thus, these individuals have the experience to understand when the fundamental elements apply and when the individual must adapt the fundamentals to new situations. One of the major difficulties of teaching business is trying to ground the educational experiences of novices in a meaningful context which supports understanding and subsequent application (Pfeffer & Fong, 2002). Think of how difficult it would be to teach aspiring surgeons to perform an operation on a patient if their sole reference was a textbook. Yet, for various reasons, much of degree business education proceeds in exactly that fashion, divorced from a context which might help students develop a more informed understanding of their profession.

Given these two general dimensions (integration and context) we propose a 2 x 2 matrix of executive education participant types where the variation is one of degree (high or low) in each dimension. For example, we have had executive education participants come to us as very junior members of a business organization, and for whom business education was not their primary academic preparation. While these participants are generally eager and intelligent, there are limits to their ability to absorb typical executive education topics and applications. It is difficult to proceed beyond fundamentals with these participants. We would describe these individuals as having low integration and low context. As such, we refer to this participant type as "Explorers."

There are participants who come to our executive education programs with substantial experience in business organizations, but little academic preparation in the business disciplines. These individuals have a broad understanding of context as a result of their experience, but little formal understanding of the specific nature of the business disciplines, including the tools and processes which might inform their strategic understanding of the business as a whole. We would describe these individuals as having low integration and high context. These are the individuals who have most likely advanced in the organization from a functional specialty (e.g., engineering) and have been promoted due to their well-developed understanding of esoteric issues. As such, we refer to this *worldly-wise* participant type as “Cosmopolitans”.

Some participants in executive education have advanced levels of academic preparation for business as a result of undergraduate and/or graduate coursework in the business disciplines, but have limited (or no) experience as a strategic player in organizations (low context, high integration). Often, these are younger individuals for whom opportunities for leadership are limited. Typically highly motivated, these individuals are eager to demonstrate their keen understanding of business, but are often tempered in their ambitions (and impulses) by well-meaning mentors and supervisors. We refer to these individuals as “Thoroughbreds” because they are strong and capable, but are often limited in their strategic vision (wearing “blinders”) because they have not yet developed the complex and differentiated perspectives afforded by experience. The final classification of executive education participants is that of “Sages”, or those individuals who, by virtue of their academic preparation and experience, have the knowledge and skill base essential for strategic leadership (high context, high integration). These are the individuals in the organization who have “been there, done that” and who usually serve as mentors for junior organizational members. These individuals are often eager to teach others and to impart their wisdom, much as you would expect of a wise and experienced member of an organization. Figure 1 provides a matrix of participant types by the dimensions of context and integration.

Figure 1: Executive Education Participant Types by Context and Integration

High Context	<i>Cosmopolitans</i>	<i>Sages</i>
Low Context	<i>Explorers</i>	<i>Thoroughbreds</i>
	Low Integration	High Integration

Given this classification of participant types, it follows that programs and coursework for these different executive education participants should be focused on their specific needs. Yet such a uniquely customized set of programs would most likely be inordinately expensive and operationally difficult to execute. What follows, then, are discussions of varied approaches to executive education and strategies for blending these approaches in meaningful ways.

Instructor-Centered and Participant Centered Education

We tend to teach students in our business schools (and executive education programs) much the same way as students have been taught for over one hundred years (e.g., White, 1886). The instructional systems in place are generally referred to as “pedagogy” (Greek: “child-leading”), and describe a sequence of educational activities where the student is primarily a passive receiver of information (instructor-centered instruction). Even though business and executive education providers offer a varied array of formats, schedules, locations, flexibility and modes of delivery (Olian, 2002), in most educational institutions, functionally structured programs and pooled-interdependent curricula remain much the same as when they were developed in the 1950’s and 1960’s (Hyslop & Parsons, 1995).

These systems may have their uses in environments where foundational knowledge acquisition is the primary educational intention, but such processes are far removed from the realities of managing in the complex organizations (Aram & Noble, 1999) and not well suited to what many would consider to be the primary executive audience. The chief concerns associated with a pedagogical approach to business and executive education are that such an approach lacks context and integration (Pfeffer & Wong, 2002; Valle, O'Mara & Cassill, *in press*).

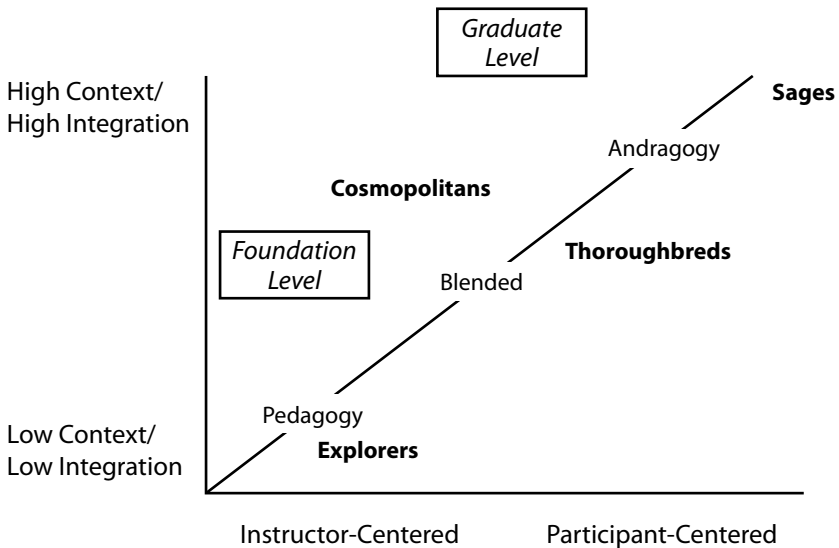
Contrast the “child-leading” system with which we are familiar (e.g., lecture classes, rote memorization and recitation of facts, objective testing, etc.) with the alternate instructional system described as andragogy (Knowles, 1980). The system presented as andragogy (Greek: “man-leading”) contains a number of assumptions about the way adults learn. These assumptions are (Knowles, 1980):

1. Adults need to know the reason for learning something.
2. Experience (including error) provides the basis for learning activities.
3. Adults need to be responsible for their decisions on education; adults need involvement in the planning and evaluation of their instruction.
4. Adults are most interested in learning subjects having immediate relevance to their work and/or personal lives.
5. Adult learning is problem-centered rather than content-oriented.
6. Adults respond better to internal versus external motivators.

For executive education providers, teaching all four types (Explorers, Cosmopolitans, Thoroughbreds and Sages) using either a purely traditional pedagogical or andragogical approach, given the fact that these participants occupy unique spaces on the context-integration matrix, risks failure on a number of fronts because the instruction is either too participant-centered, or not participant-centered enough. Ideally, executive education for each unique participant type should be a mix of the two approaches, with programs offerings more pedagogical activities for some participants and more andragogical activities for others. By collapsing the categories (context and integration), we find that the ideal instruction types are anchored by andragogy for “Sage” executive participant types (because those approaches are more participant-centered) and pedagogy for the pure “Explorer” types (because those

participants require more instructor-centered approaches). Such a continuum is presented in Figure 2. Remember, however, that even these two pure forms of instruction are not well suited to the Cosmopolitans and Thoroughbreds, nor are they well suited to the Explorers and Sages under all circumstances. Rather than thinking of program design as an “either/or” decision, we offer a range of possible course design options for executive education participants in multiple stages of context and integration.

Figure 2. Relationship of Instructor/Participant-Centered Instruction to Business Context/Subject Matter Integration

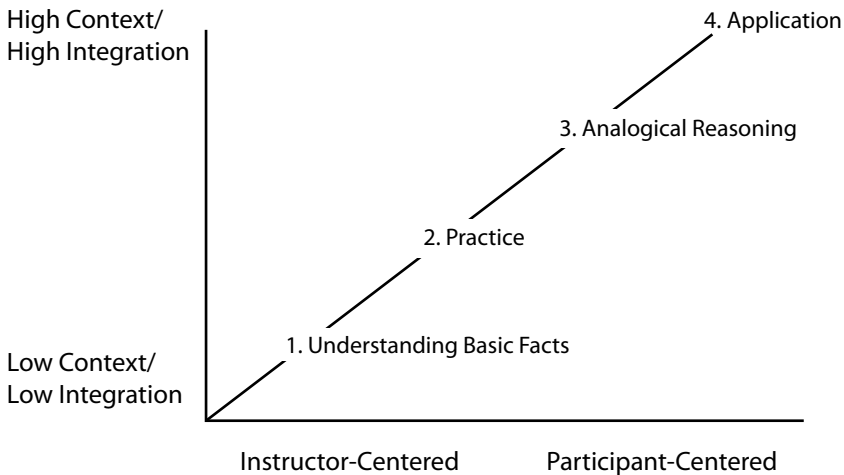


Targeting for Maximum Impact: Educational Practices for Effective Executive Education

The first element in our approach to targeting executive education instruction (see Figure 3) to the needs of individual participants is to consider the nature of the deficits in integration experienced by the participant (this information is gleaned from our participant questionnaire). Regardless of whether the participant is low on context or not, the first assessment considers whether or not the participant

possesses fundamental knowledge of the business discipline that forms the substance of the engagement. As Willingham states, “factual knowledge must precede skill.” (Willingham, 2009: 19). This statement seems obvious to educators, and its value as a precursor to the development of higher level cognitive skills has been repeatedly demonstrated through empirical research (e.g., Alexander, Kulikowich, & Schulze, 1994). The unifying ideas of each discipline should be learned early and, at the very least, a basic mastery attained. This is where the traditional pedagogical approaches come in. Granted, instructor-centered approaches are perceived to be less interesting to executive audiences, and we caution that such approaches should not be overdone, but such instructional techniques as lectures and repeated practice with fundamental operations are the best ways to provide content information to novices (Explorers and Cosmopolitans).

Figure 3. Stages of Instruction



Once initial understanding and basic mastery of the business discipline subject matter have been attained, practice must be engaged so that the information is retained in long-term memory, where it is available for recall (Willingham, 2009). Practice aids in the development of tacit knowledge, and it is crucial for developing connections between

seemingly disparate cognitive operations (Mayer, 2004). Practicing managers cannot know anything for certain and likewise cannot use that information if it is not firmly lodged within their long term memory (Cepeda, Pashler & Vul, 2006). With increased practice comes increased confidence, and that is the basis for enhanced critical thinking and the development of context. If we are to have any faith in the decision making abilities of business executives, we must ensure that the building blocks of fundamental knowledge are firmly fixed in their minds. Explorers do not become Sages by doing what Sages do – they must build expertise by repeated practice. Traditional pedagogical approaches provide the mechanism (practice) for the development of more complex knowledge.

The next step in this blended approach to executive education is for instructors to provide opportunities for participants to apply analogical reasoning to different, but related tasks. In this way, the instructor begins to use more active, participant-centered learning approaches to develop effective learning and transfer (Loewenstein, Thompson & Gentner, 2003). By moving from the known to the unknown in discrete, measured steps, the instructor helps the participants develop more complex and differentiated frames of reference for solving problems. It is also with these approaches that the participant builds skills in context development, or the application of the subject matter to real problems. Put simply, experience builds context.

The final step in the targeted approach to executive education is exposure to real world applications and problems that do not have finite or pre-scripted solutions. This should be a completely participant-centered approach wherein the participants are tasked with gathering, analyzing, and synthesizing data from similar and/or different business domains in order to come up with solutions to complex business problems. This stage should involve application-oriented activities that engage participants in the real problems of current business life.

Appropriate Activities within Different Learning Environments

The goal of every executive education engagement should be to create participants who are on roughly equal footing with one another such that they are capable of successfully applying integrated content knowledge in a highly contextual environment. It is important to point out that there are many ways to build integration and context. However, the same developmental process should be applied to enable participants

to progressively proceed through the crucial developmental stages from pedagogy to andragogy, as need be. The role of the executive education instructor should shift from one of director of classroom activities to facilitator of learning environments as the participants progress through the stages of context and integration development.

Figure 4. Relationship Between Learning Environment and Faculty/Participant Role in Instruction

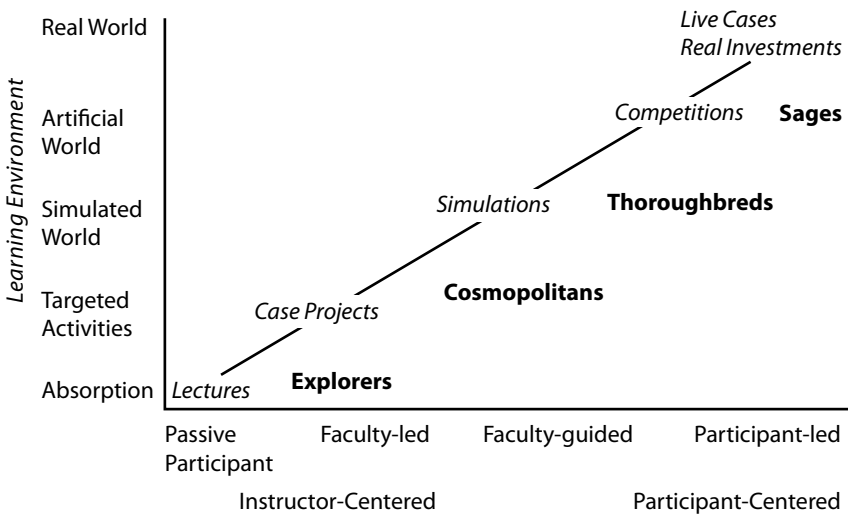


Figure 4 describes the adoption of a variety of activities in different learning environments and their relationship to the shifting role of the executive education faculty in the instructional process. The learning environments range from the traditional pedagogical approach where the initial concepts and basic level knowledge are disseminated and understood (“Absorption”) to activities where the participants are engaged with real problems (“Real World”) that have immediate, practical implications for clients. Between these two endpoints are three additional environments that are useful for transitioning the executive participant from the traditional context to the real world context. The first step away from the traditional learn-and-know approaches is to make use of activities that focus on developing specific skills and knowledge

("Targeted Activities"). Case analyses, for example, may help Explorer participants develop the capabilities to use subject matter knowledge in novel situations. The instruction in this environment, however, is primarily instructor-centered.

Once participants have demonstrated a basic understanding of concepts and have practiced basic operations within the discipline, they can benefit greatly from moving on to increasingly complex analogical approaches. Computer simulations are excellent environments for Cosmopolitans because they require that these participants integrate disparate concepts for use in an applied setting ("Simulated World"). Simulations force Cosmopolitan participants to consider the activities of an organization simultaneously and holistically. While the faculty member certainly controls the simulation, the debriefing for each round, and the timing of the simulation, their roles are beginning to move from instructor-centered to participant-centered. The instructors can interject as they see fit, perhaps advise participants, and even review important concepts, but they are not making the decisions — it is the responsibility of the Cosmopolitans to make decisions, and those decisions help Cosmopolitans develop integrated business skills. Simulated worlds are also useful for Thoroughbreds because they help these participants develop context, or experience making strategic decisions.

Although the simulated environment provides an excellent vehicle for building integration and context, it is still a simulation and housed within the confines of a classroom environment. The "Artificial World" extends the learning process by subjecting the participants to a competition against participants or groups from programs. Regardless of the format, the environment is considerably more integrated, context-rich, and participant-centered than in all previous learning environments. In this environment, Thoroughbreds build strategic skills in real time, and Cosmopolitans develop confidence in their abilities to think holistically and strategically.

Finally, the "Real World" environment seeks to create an environment for the participants that is as close to real life as possible. The "Real World" environment is highly integrated and context-rich. These "live cases", where participants may be engaged with real decisions in real time, are valuable activities that still contain an element of safety (participants can still learn by making mistakes, confident that the instructors will not let the situation get too far out of hand). The "clients" are not characters in a case study, a company in a fictitious simulation, or even people in a competition's scenario, but rather real people with real issues. The reality

of this type of environment excites participants because it allows them to play the role of Sage, albeit for another organization. And Sages excel in this type of learning environment; it may be such that executive education faculty learn more from this type of environment than the executive participants!

Conclusion

The goal of this paper has been to present a systems view of executive education that takes into account the development needs of individual executive participants. It is possible to move to more participant-centered learning environments more quickly than, perhaps, MBA instruction. But that movement must only occur when the participants are ready to move. We must also emphasize that we are not trying to demean what has been referred to as traditional pedagogy. This approach to education is wholly appropriate for many of the activities that build core knowledge and skills in the business disciplines; in fact, the core strength of the pedagogical approach is its focus on building fundamental knowledge and skills. Without such fundamental knowledge and skills, however, all else is useless. We are only arguing for a more targeted approach to assist executive participants in learning the context and integration necessary to help them with their duties. The systems discussed in this paper provide for a more informed progression and a set of tools and approaches to aid executive program design and execution. We believe that our targeted approach can come only from deliberate attempts by executive education faculty to create integrated, context-rich activities that build from the basics to the complex, and do so in a structured, planned way.

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