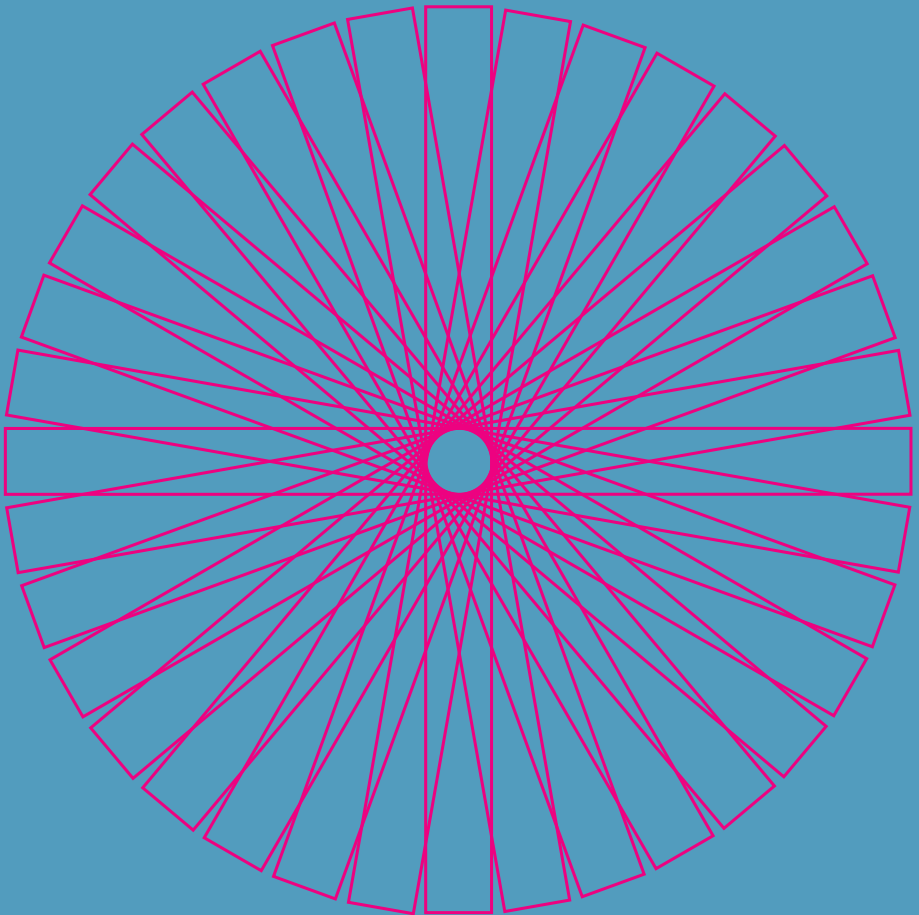


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# Leadership Development & Personal Effectiveness



# Song of the Open Road

Here is the test of wisdom,  
Wisdom is not finally tested in schools,  
Wisdom cannot be passed from one having it, to another not  
having it,  
Wisdom is of the Soul, is not susceptible of proof, is its own proof,  
Applies to all stages and objects and qualities, and is content,  
Is the certainty of the reality and immortality of things, and the  
excellence of things;  
Something there is in the float of the sight of things that provokes it  
out of the Soul.

Walt Whitman, *Leaves of Grass*, 1855

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# Introduction

This resource grows out of the Leading Practice seminar held in London in November 2004. It was co-presented by Richard Boyatzis and John West-Burnham. The central theme of the seminar was the relationship between personal effectiveness and leadership development. This approach is reinforced by the assertion made by Bennis and Goldsmith (1997) that:

**we learn best when we are committed to taking charge of our own learning. Taking charge of our own learning is part of taking charge of our lives, which is the sine qua non of becoming an integrated person.** (Bennis and Goldsmith, 1997, p.9)

This is further reinforced by Senge (2004) and his colleagues:

**...if you want to be a leader, you have to be a real human being. You must recognize the true meaning of life before you can become a great leader. You must understand yourself first.** (Senge, 2004, p.186)

**...in this sense, the cultivated self is a leader's greatest tool ... It's the journey of a lifetime.** (ibid, p.186)

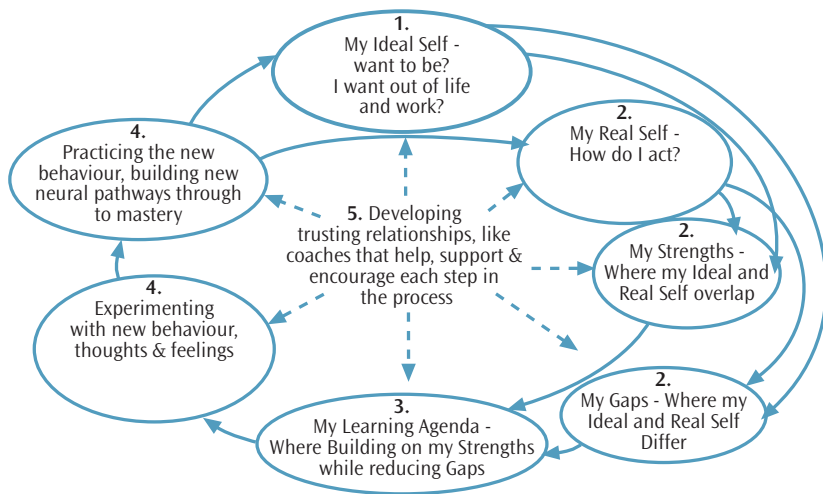
**If you want to be a great leader, ... you need to enter seven meditative spaces. These seven spaces - awareness, stopping, calmness, stillness, peace, true thinking, and attainment - can look like one step, but actually, it's a long, long process.** (ibid, pp.186-7)

**That's why I think that cultivation, 'becoming a real human being', really is the primary leadership issue of our time, but on a scale never required before.** (ibid, p.192)

Effective leadership is not just a job; it is a complex interaction between a range of personal and professional qualities and experiences. At the heart of effective leadership is a model of learning that is rooted in personal reflection to enable and enhance understanding and so inform action. We all reflect all the time, at the end of a difficult meeting, driving home, reading the paper, at a conference when a chance comment triggers a chain of thought. However, this is often random and haphazard reflection, and while valuable, it does not permit sustained and fundamental questioning and analysis. Structured reflection is central to any approach to enhancing and sustaining personal and professional effectiveness: any expression of personal artistry or mastery, for example in the performing arts, the creative arts, in spiritual development or professional practice, has to be rooted in reflection.

The purpose of this resource is to support personal review and reflection using the Boyatzis five-stage process (Figure 1).

Figure 1. Boyatzis' Theory of Self-Directed Learning (Goleman, Boyatzis, and McKee, 2002)



# Becoming a Resonant Leader:

## The Five Discoveries

Boyatzis' theory of self-directed learning

### 1. The First Discovery

- **My ideal self**
- Who do I want to be?

### 2. The Second Discovery

- **My real self**
- Who am I?
- What are my strengths and gaps?

### 3. The Third Discovery

- **My learning agenda**
- How can I build on my strengths while reducing my gaps?

### 4. The Fourth Discovery

- **Experimenting with new behaviours, thoughts and feelings to the point of mastery**
- What actions do I need to take?

### 5. The Fifth Discovery

- **Developing trusting relationships that help, support and encourage each step in the process**
- Who can help me?

The following is a summary of Goleman 2002 pp 109-12.

# Self-directed Learning

The crux of leadership development that works is self-directed learning: intentionally developing or strengthening an aspect of who you are or who you want to be, or both. This requires first getting a strong image of your ideal self, as well as an accurate picture of your real self - who you are now. Such self-directed learning is most effective and sustainable when you understand the process of change – and the steps to achieve it as you go through it.

Self-directed learning involves five discoveries, each representing a discontinuity. The goal, of course, is to use each discovery as a tool for making the changes needed to become an emotionally intelligent leader.

This kind of learning is recursive: the steps do not unfold in a smooth, orderly way, but rather follow a sequence, with each step demanding different amounts of time and effort. The results of practising new habits over time are that they become part of your new real self. Often, with changes in your habits, emotional intelligence (EI) and leadership styles, come changes in your aspirations and dreams, your ideal self. And so the cycle continues – a lifelong process of growth and adaptation.

When you go through the discovery of uncovering an ideal vision of yourself, you feel motivated to develop your leadership abilities, that is, you see the person you want to be.

**The Second Discovery** is akin to looking into a mirror to discover who you actually are now - how you act, how others view you and what your deep beliefs comprise.

**The Third Discovery** involves a plan of action that provides detailed guidance on what new things to try each day, building on your strengths and moving you closer to your ideal.

**The Fourth Discovery** comes in practising new leadership skills.

**The Fifth Discovery** may occur at any point in the process. It is that you need others to identify your ideal self or find your real self, to discover your strengths and gaps, to develop an agenda for the future and to experiment and practise.

**Without others' involvement, lasting change can't occur.**

(Goleman, 2002, pp.109-11)

This process is supplemented by extracts from the thinkpiece for the seminar prepared by John West-Burnham and additional questions and propositions to support reflection.

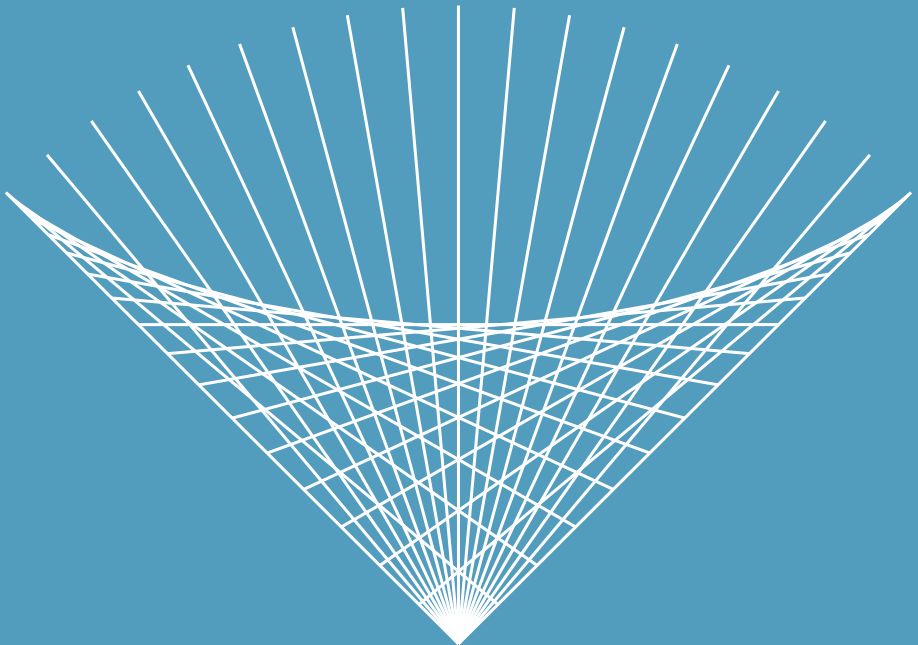
This resource can be used in a number of ways:

- as a guide to support personal reflection
- as shared reflection with a colleague or critical friend
- to support work with a mentor
- as a resource to support team learning and development activities

As a preliminary to this resource, you may find it helpful to complete the learning styles inventory (Appendix 1) to help you understand yourself as a learner and the role of reflection in your professional practice.



# 1. Becoming an Authentic Leader





# 1. Becoming an Authentic Leader

This discussion argues for a model of leadership development that is based on the following propositions.

- Leadership development is symbiotic with personal growth.
- Effective leadership is rooted in personal authenticity.
- Authenticity is the interaction of values, language and the capacity to act.
- Becoming authentic is an emergent process – complex interactions over time.
- Complex interactions involve deep and profound learning.

Leadership is increasingly defined in terms of abstract and complex qualities. The growing focus on learning-centred leadership and the interpersonal, moral and spiritual and futures orientation of leadership have led to increased complexity and elusiveness in defining the characteristics of leaders. To some extent this is a product of the increasing emphasis being placed on the difference between leadership and management. Management is increasingly being defined in terms of concrete and operational activities that are easy to define. We need to increase our ability to develop a more meaningful and effective vocabulary to facilitate dialogue around the process of leadership learning and development.

Such a vocabulary would help to address two fundamental problems in evaluating the success of leadership development. Firstly, there is the problem in establishing a causal relationship between developmental activities and changes in the perceived leadership effectiveness of participants: the more complex the theme, the greater the number of potential intervening variables. The second issue relates to impact – the extent to which any developmental process actually leads to significant change that can be described and explained in terms of enhanced capacity and the achievement of desired results.

One possible way of approaching these issues is to develop a new conceptual framework to try and explain how people grow into effective and successful leadership.

Such growth might be seen to have two dimensions - the process of becoming a leader, and recognition of leadership as a way of being rather than a set of behaviours or outcomes. As Bennis and Goldsmith (1997) express it:

**the process of becoming a leader is much the same as the process of becoming an integrated human being ... leadership is a metaphor for centeredness, congruity and balance in one's life. (Bennis and Goldsmith, 1997, p.8)**

Thus it might be argued that leadership development is a process of 'self-invention' (Bennis 1989 p 50), which is directly linked to the creation of personal authenticity. For Taylor (1991), authenticity is about developing a personal integrity:

**Being true to myself means being true to my own originality, and that is something only I can articulate and discover. In articulating it, I am also defining myself. (Taylor, 1991, p.29)**

In essence, to become a leader is to become an authentic person and that involves realising my full capacity as self. Guignon (2004) describes this as:

**...centering in on your own inner self, getting in touch with your feelings, desires and beliefs, and expressing those feelings, desires and beliefs in all you do ... defining and realizing your own identity as a person. (Guignon, 2004, p.162)**

There are many ways of defining this concept of 'being a person' but the following elements would appear to be generic to most definitions:

- understanding self in relation to others, living and working through social relationships
- growing through the multiple manifestations of loving and being loved, through family life and friendships (social, sexual and spiritual)
- a sense of having the potential to achieve self-actualisation
- the ability to be creative
- the engagement with beauty in art and nature, from mindscapes to landscapes

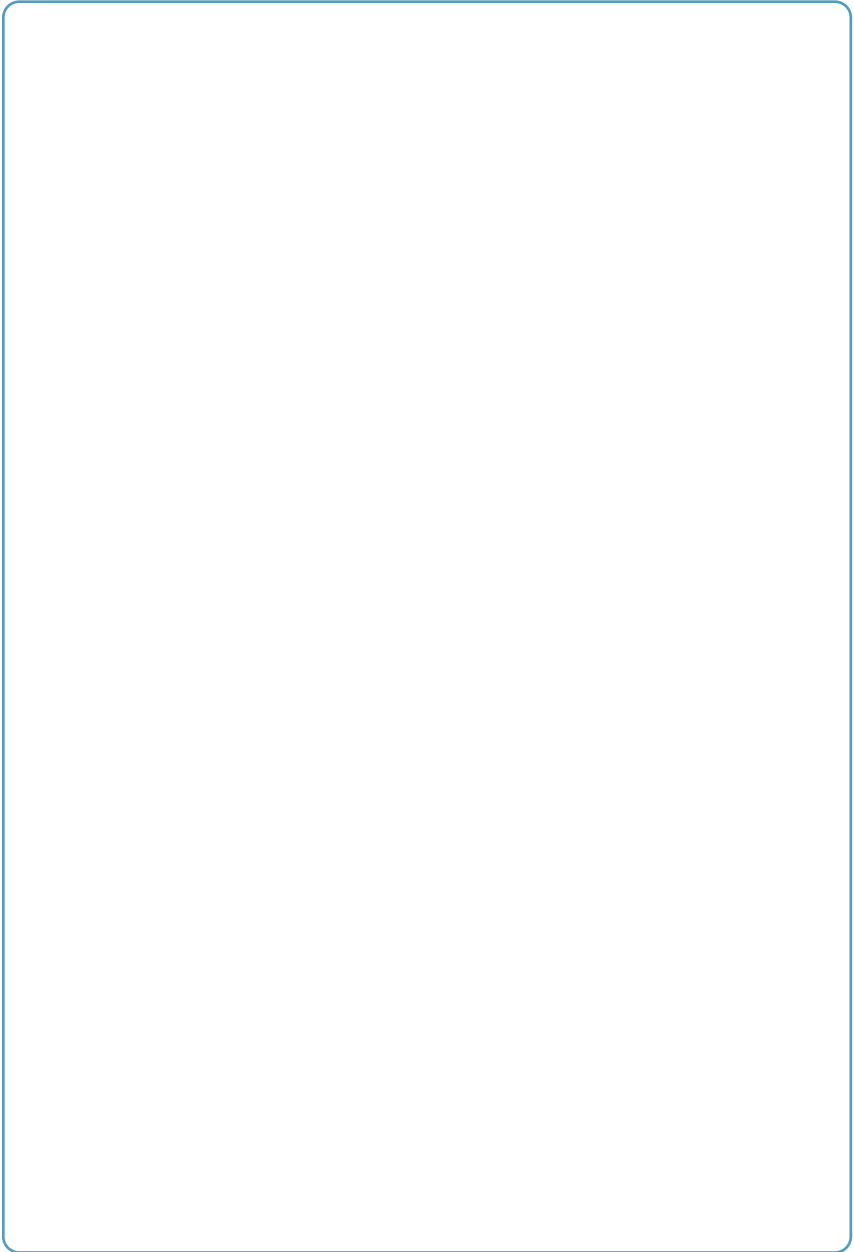
**However this is not a solitary process:**

**It also has a social dimension insofar as it brings with it a sense of belongingness and indebtedness to the wider social context that makes it possible. (Guignon, 2004, p.163)**

Becoming a leader is becoming a person and that, by definition, is a social process.



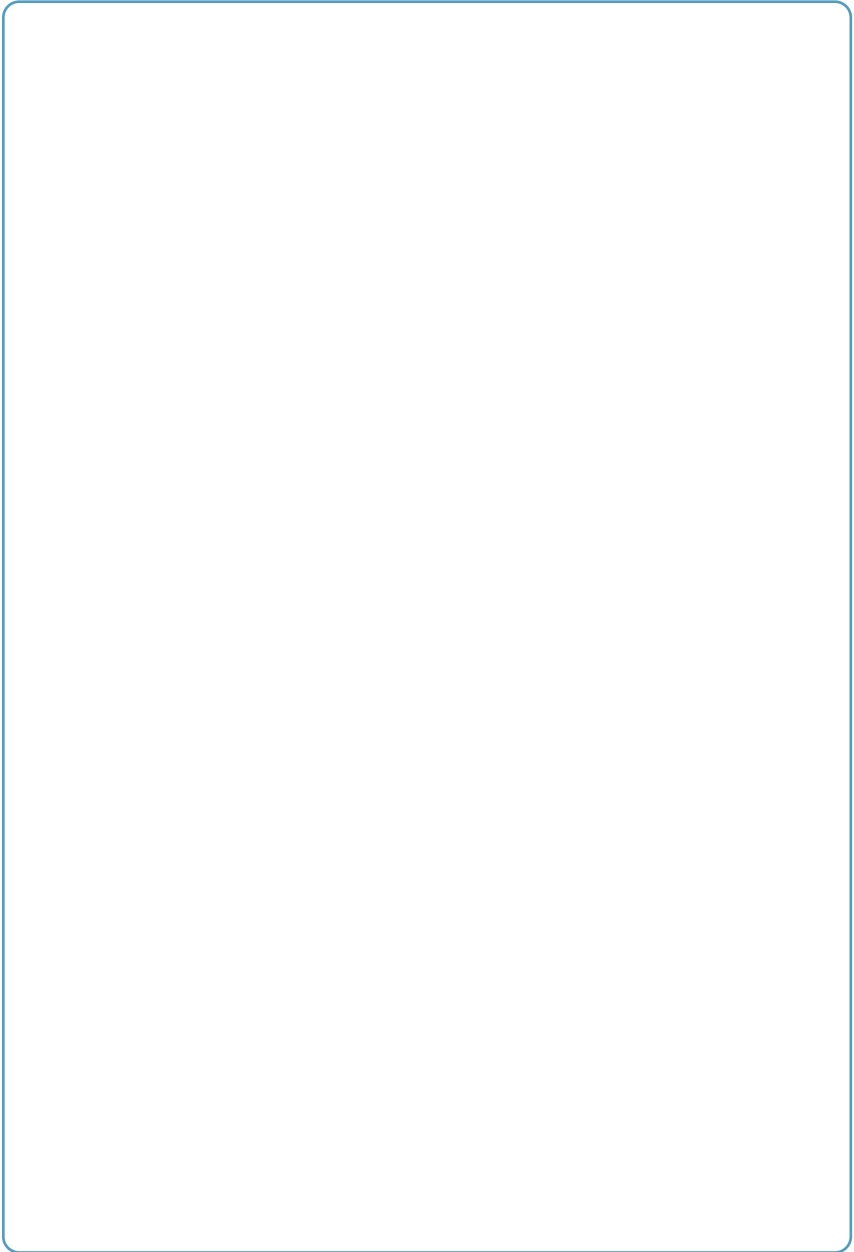
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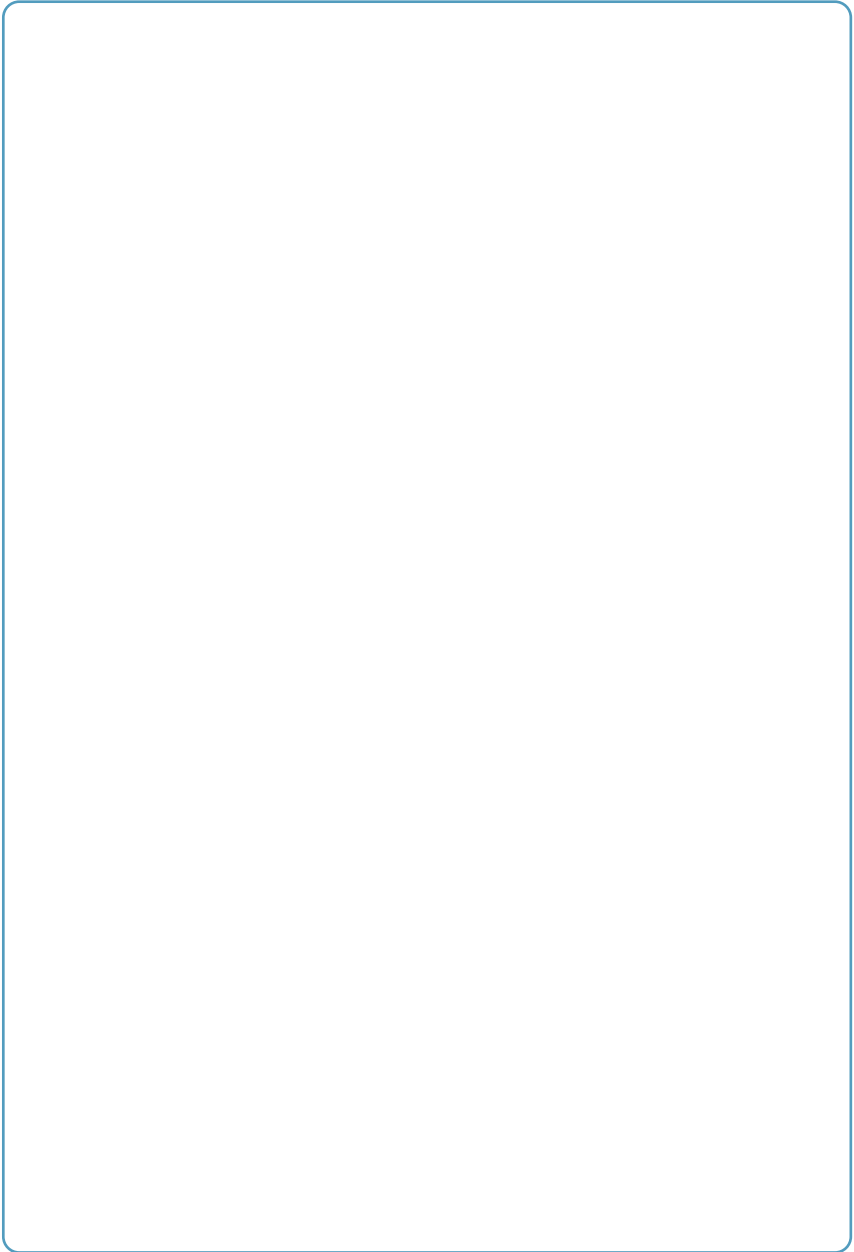




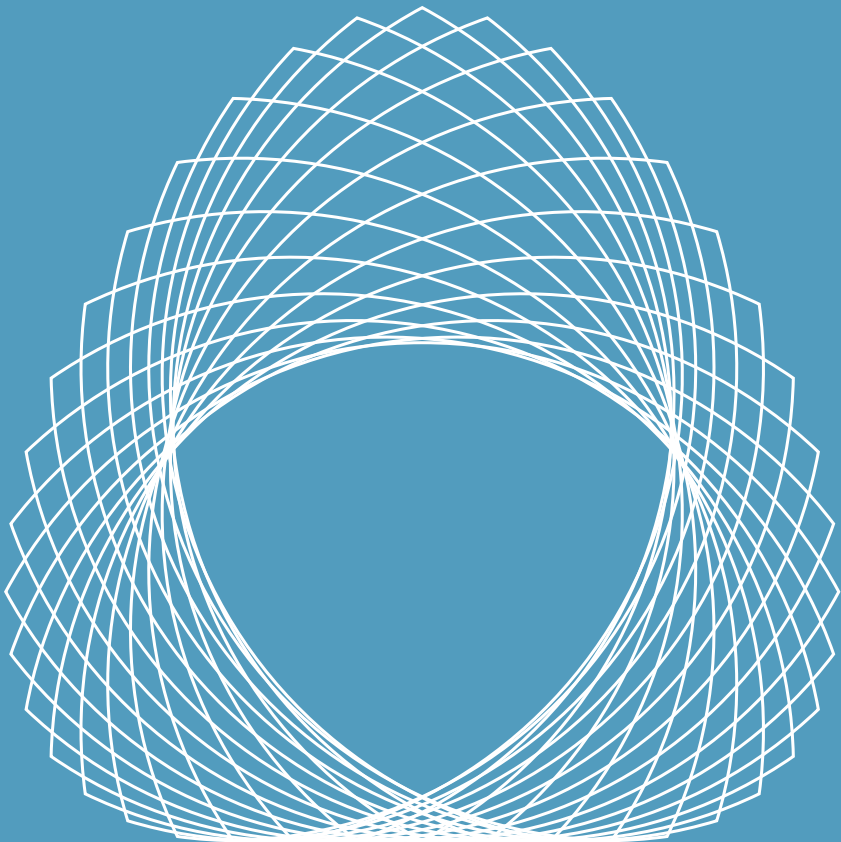
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## 2. Personal Authenticity





## 2. Personal Authenticity

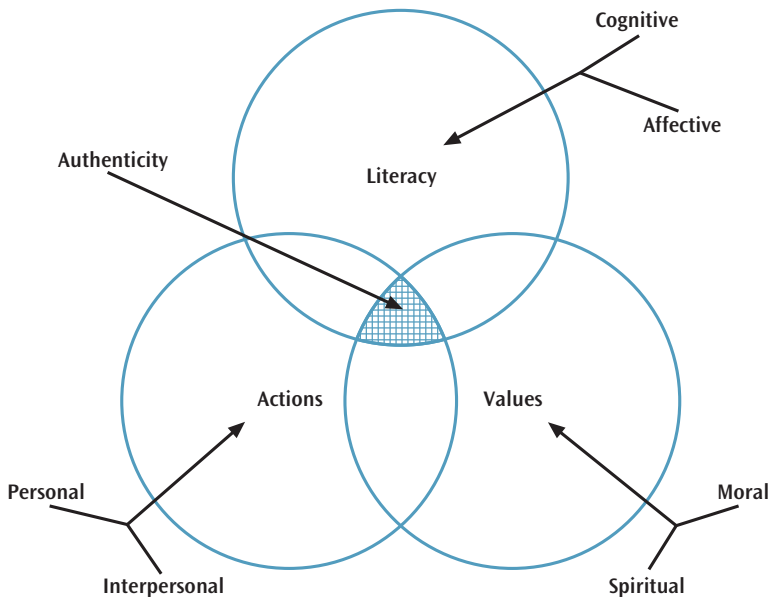


Figure 2: Understanding personal authenticity

Figure 2 offers a model of personal effectiveness that demonstrates the connectedness and interdependence of three elements.

1. Literacy: the development of a personal language that is rooted in a rich vocabulary that allows for the full expression of both the affective (the emotions) and the cognitive (the intellectual). Effective people (and leaders) are equally comfortable in engaging with the emotional and intellectual and have the skills to communicate to achieve understanding and influence. Central to this is the notion of dialogue, the ability to hold meaningful conversations with self and others.

2. Values: the translation of moral and spiritual dimensions into a coherent and meaningful set of personal constructs that inform language and action.
3. Action: the ability to use language based on values to inform personal choices and engagement with others. Equally the intrapersonal informs and enhances language and ensures that values are informing personal and social action.

It is in the connectedness and interdependency that authenticity is able to grow, mature, develop and find full expression. Kovan and Dirkx (2003) provide a powerful example of the integrative nature of personal development in their study of environmental activists:

The activists' descriptions of their experience implicitly portray a multiplisitic sense of self. For example, they talked metaphorically about the head, the heart, and the spirit; how each of these entities were present in their lives and work in different ways; and how each aspect of their being has to be a recognized piece of who they are in the world in order to feel whole, to gain some degree of integration and sense of wholeness, and to be able to continually push forward in working towards their passions.

**Although all the participants reflected systemic thinking and a strong reliance on their intellect within their work, these processes seemed grounded in and derived from strong emotional and spiritual connections to themselves, nature, and humanity. (Kovan and Dirkx, 2003, p.108)**

Leadership development therefore might be seen as the process of becoming personally authentic. Becoming authentic is not an event, it is a set of complex relationships and interactions – leadership learning might be seen as a recursive system in which:

**it is impossible to measure initial conditions with enough precision to determine causal relations accurately ... unpredictability, therefore is unavoidable. Unlike linear systems, in which causes and effects are proportional, in recursive systems, complex feedback and feed-forward loops generate causes that can have disproportionate effects. (Taylor, 2001, p.24)**

The process of becoming authentic might be described as emergent, which Johnson (2001) defines as ‘the movement from low-level roles to higher level sophistication’ (p.18) through a process in which behaviour shows ‘the distinctive quality of growing smarter over time and of responding to the specific and changing needs [of the] environment (p.20).

Holland (1998) summaries the essential characteristics of emergence as follows.

1. Emergence occurs through interconnected networks.
2. The whole is more than the sum of the parts.
3. Emergent phenomena are persistent patterns with changing components (eg a fountain).
4. Context determines function.
5. Interactions increase competence.
6. Persistent patterns allow the formulation of generic trends.  
(Holland, 1998, pp.225-7)

In this context, Holland argues that innovation is the result of:

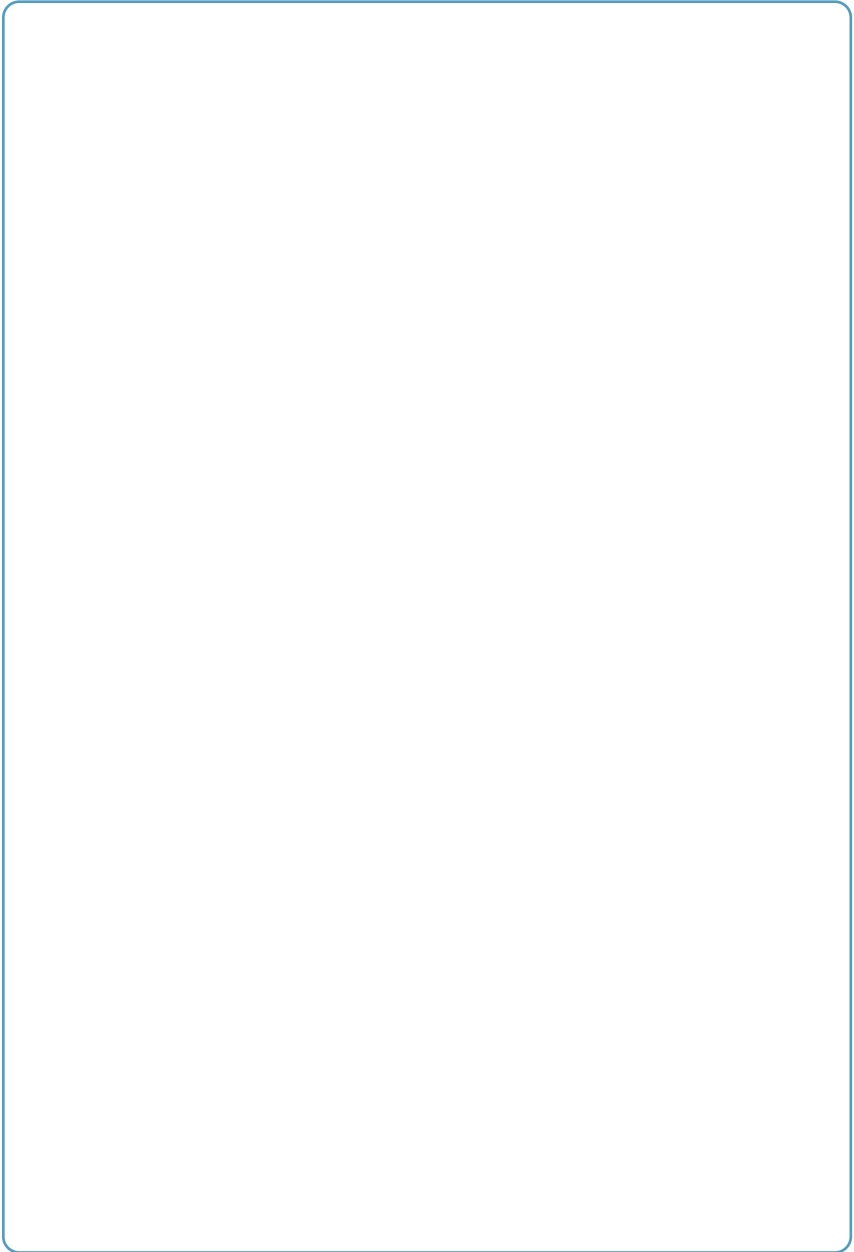
**(a) discovery of relevant building blocks, and (b) construction of coherent, relevant combinations of these building blocks.**

(*ibid*, p.217)



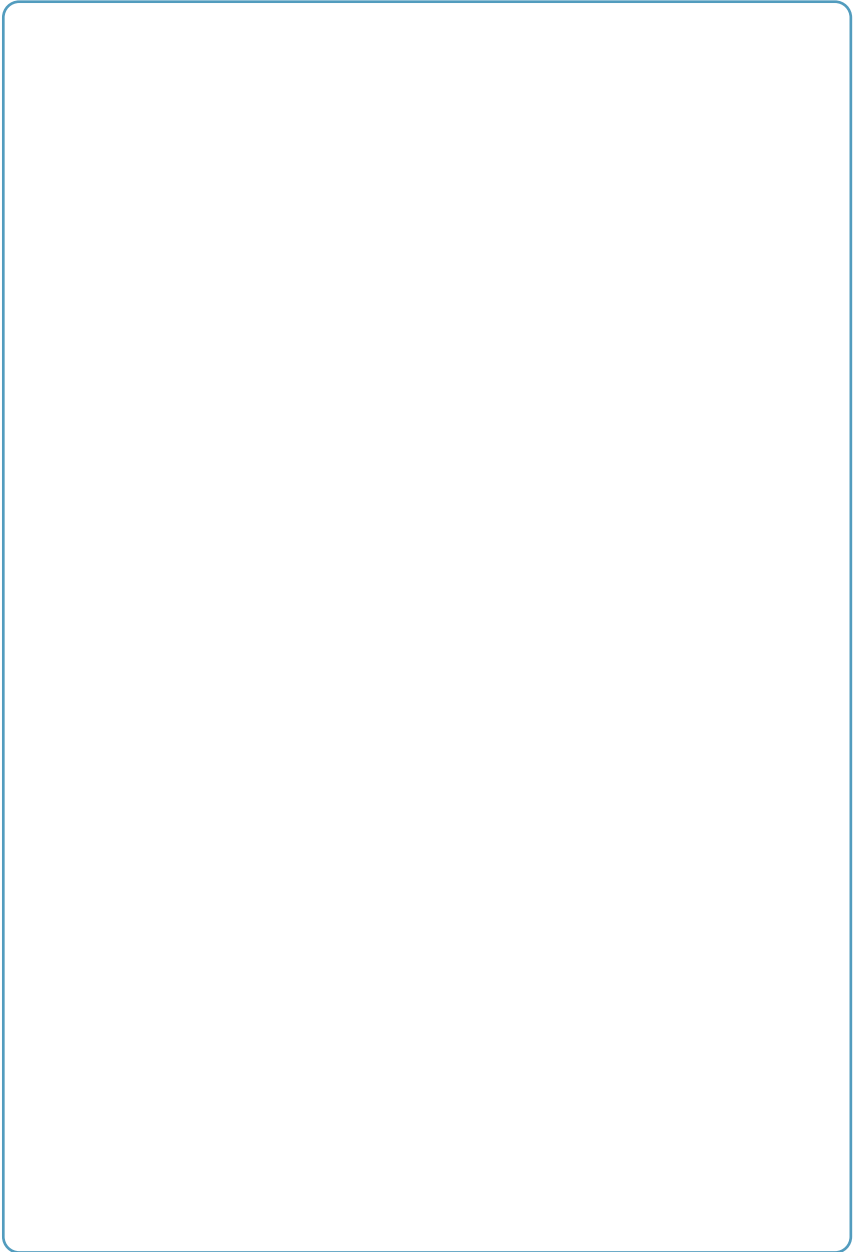


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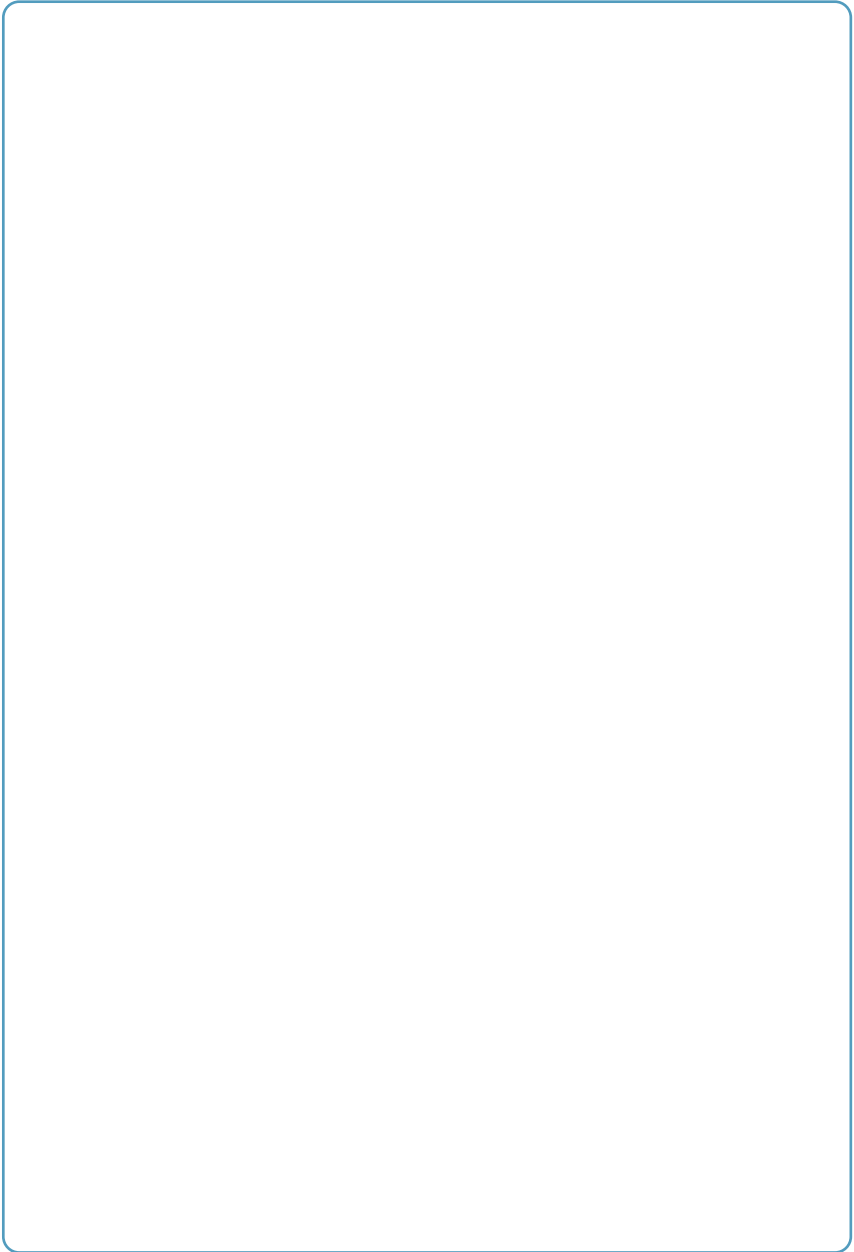




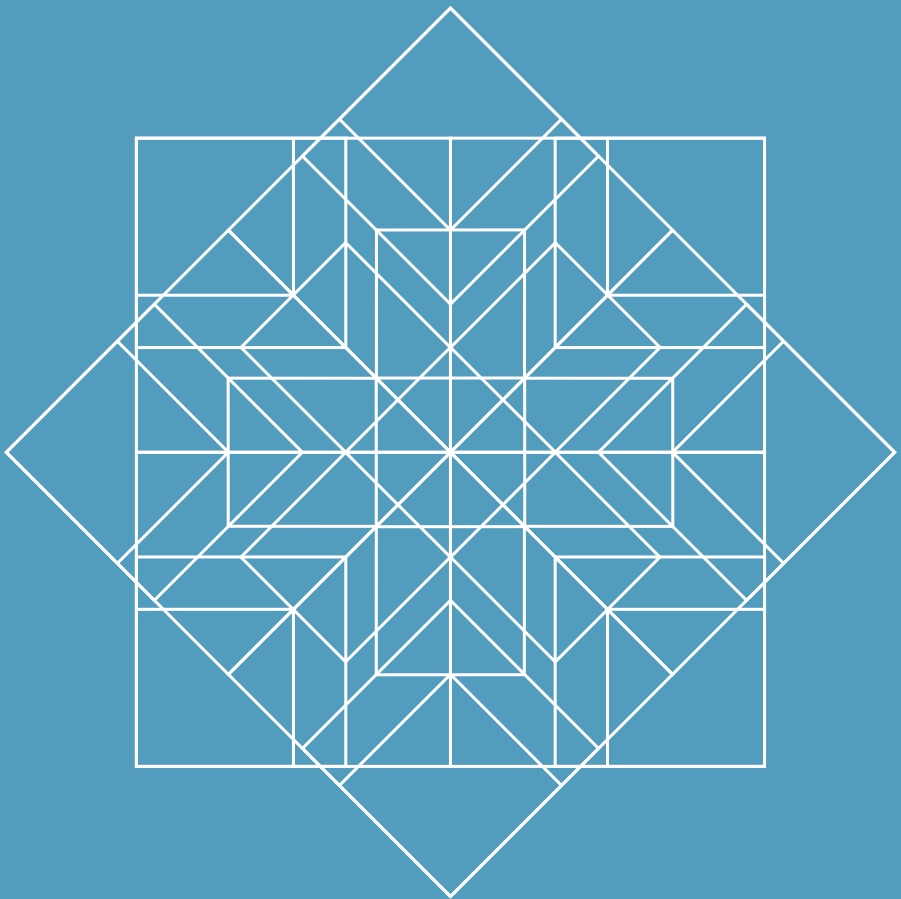
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### 3. Understanding Learning





### 3. Understanding Learning

For many educators, the concept of learning is implicit and assumed. In some usages it implies what the learner does in response to teaching – “If you don’t pay attention to me you won’t learn this”. A common usage equates learning with memorisation – “I want you to learn this for a test tomorrow”. The paucity of our understanding of learning is reflected often in the lack of any shared or common agreement among educationalists, let alone learners, as to what the process actually involves.

What follows is an attempt to develop a model of learning which provides the basis for meaningful dialogue about the learning process and its related outcomes.

Figure 3: Modes of learning

	Shallow (What?)	Deep (How?)	Profound (Why?)
Means	Memorisation	Reflection	Intuition
Outcomes	Information	Knowledge	Wisdom
Evidence	Replication	Understanding	Meaning
Motivation	Extrinsic	Intrinsic	Authentic
Attitudes	Compliance	Interpretation	Creativity
Relationships	Dependance	Interdependence	Independence
	Single Loop	Double Loop	Triple Loop

It is important to stress at the outset that this model is not intended to be hierarchical; rather, it is descriptive of the characteristics of different modes of learning. In some contexts, shallow learning is entirely appropriate – my knowledge of how my car's engine works is shallow, but I hope that the mechanic's is deep if not profound. Equally, it is important not to impose academic values on this model; profound learning is about the more arcane branches of philosophy but it is also about the qualities of a counsellor, the skills of a joiner and the moral insights of a child.

In many important respects, shallow learning is synonymous with the prevailing patterns of schooling – it is based on the memorisation and replication of information. While it does not preclude deep and profound learning, training does limit and inhibit the potential to move beyond the shallow. Shallow learning has been adequate for a world that operated on high levels of compliance and dependence in the workplace and society. If it is true that the world is becoming a far more complex place, then it may be that the dominant mode of learning will have to change. Shallow learning may have been an acceptable foundation for life in a relatively simple world with fewer choices and greater hegemony, but it is clearly inadequate in a world of complex choices and limited consensus. Perhaps the most negative aspect of shallow learning is the emphasis that it places on extrinsic motivation, compliance and dependence.

Deep learning, by contrast, creates understanding – what happens when generic information becomes personal knowledge, which can then be transferred between contexts and over time. Experience is understood through reflection and the motivation to learn is intrinsic. Deep learning allows personal interpretation and creates a sense of confidence through interdependent learning.



Profound learning works on a different level of significance altogether. Shallow learning results in the ability to apply a formulated response to a problem, if it is presented in the right way. Deep learning allows a range of responses to be formulated, tested and applied. Profound learning leads to the problem and solution being redefined. Profound learning is about the creation of personal meaning and so enhances wisdom and so creativity. Experience is processed intuitively. The motivation to learn is moral and the outcome of profound learning is the ability and willingness to challenge orthodoxy. Such learning is sustained through interdependent engagement in problem-solving and thinking.

Single-loop learning is shallow: it is about what, rather than 'how' and 'why'. It is for replication. Crucially, deep learners know how to create knowledge; they are reflective about what they learn and how they learn: it is double-loop learning that:

**occurs when error is detected and corrected in ways that involve the modification of ... underlying norms, policies and objectives.**

(Argyris and Schön, 1974, p.67)

Triple-loop learning is not only knowing about the what and the how, but why; it involves a fundamental reconceptualisation of what makes us unique as persons, so developing the ability to formulate strategies that are valid and fundamental to our way of being.

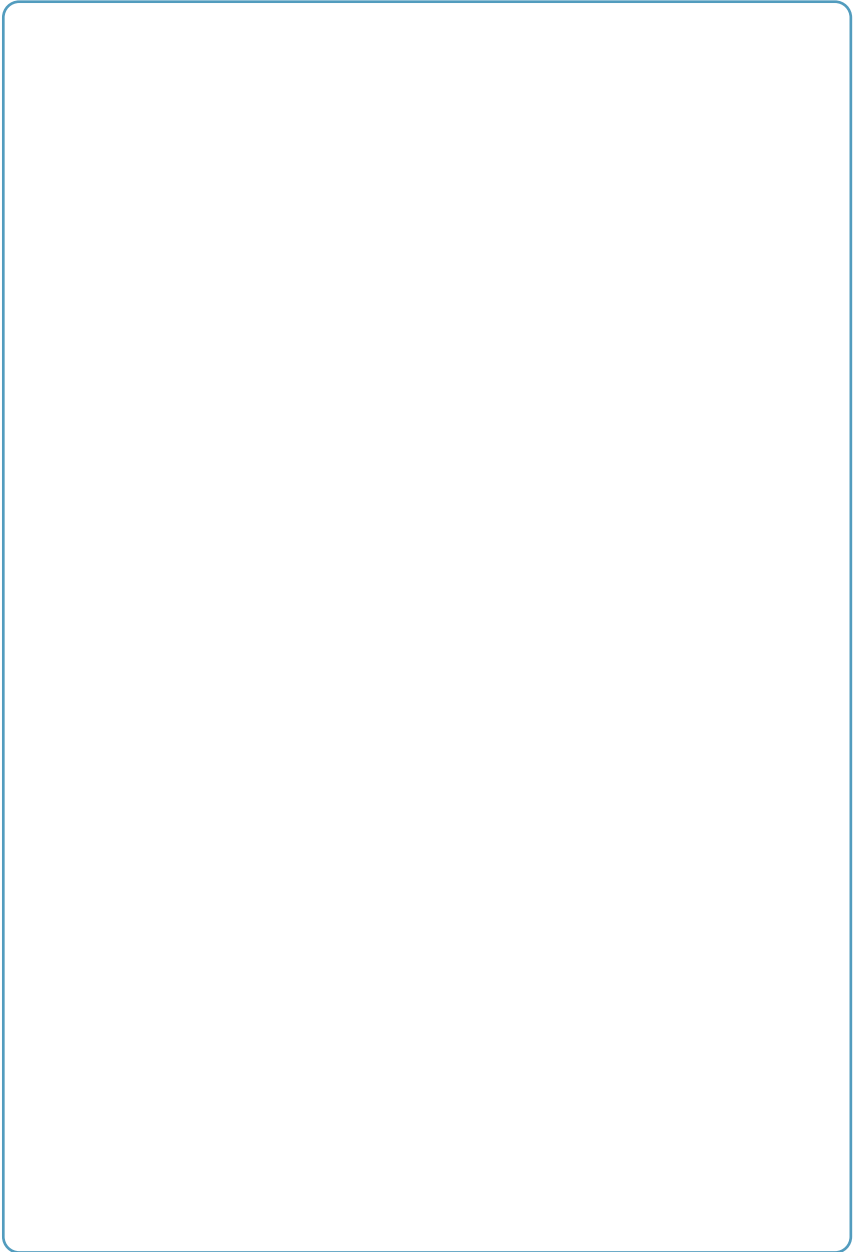
# The Third Discovery

## My learning agenda

How do I build on my strengths and reduce the gaps between my ideal and real self?

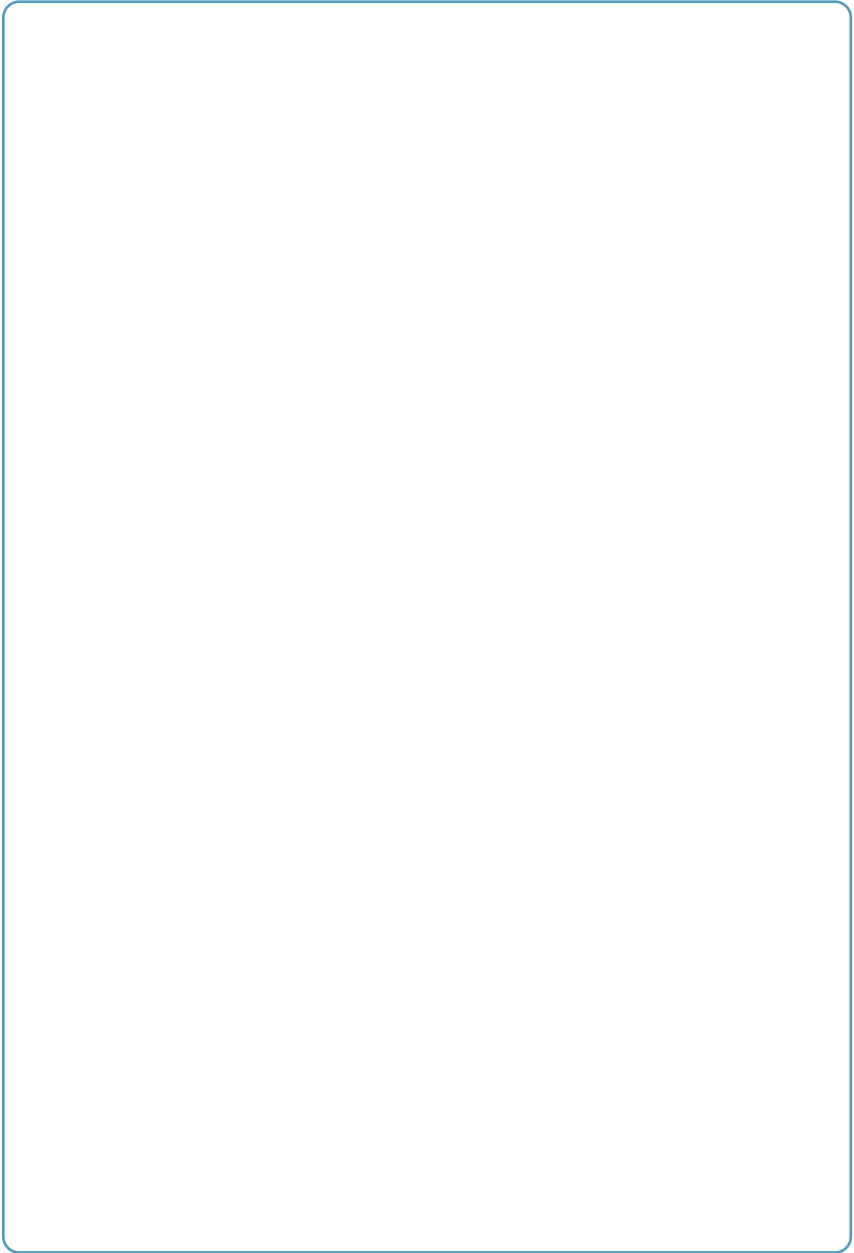
- How well do you understand yourself as a leader?
- How well do you understand yourself as a learner?
- What specific strategies do you use to ensure that your learning is more likely to be deep and profound?
- What learning processes are most appropriate to your learning agenda?

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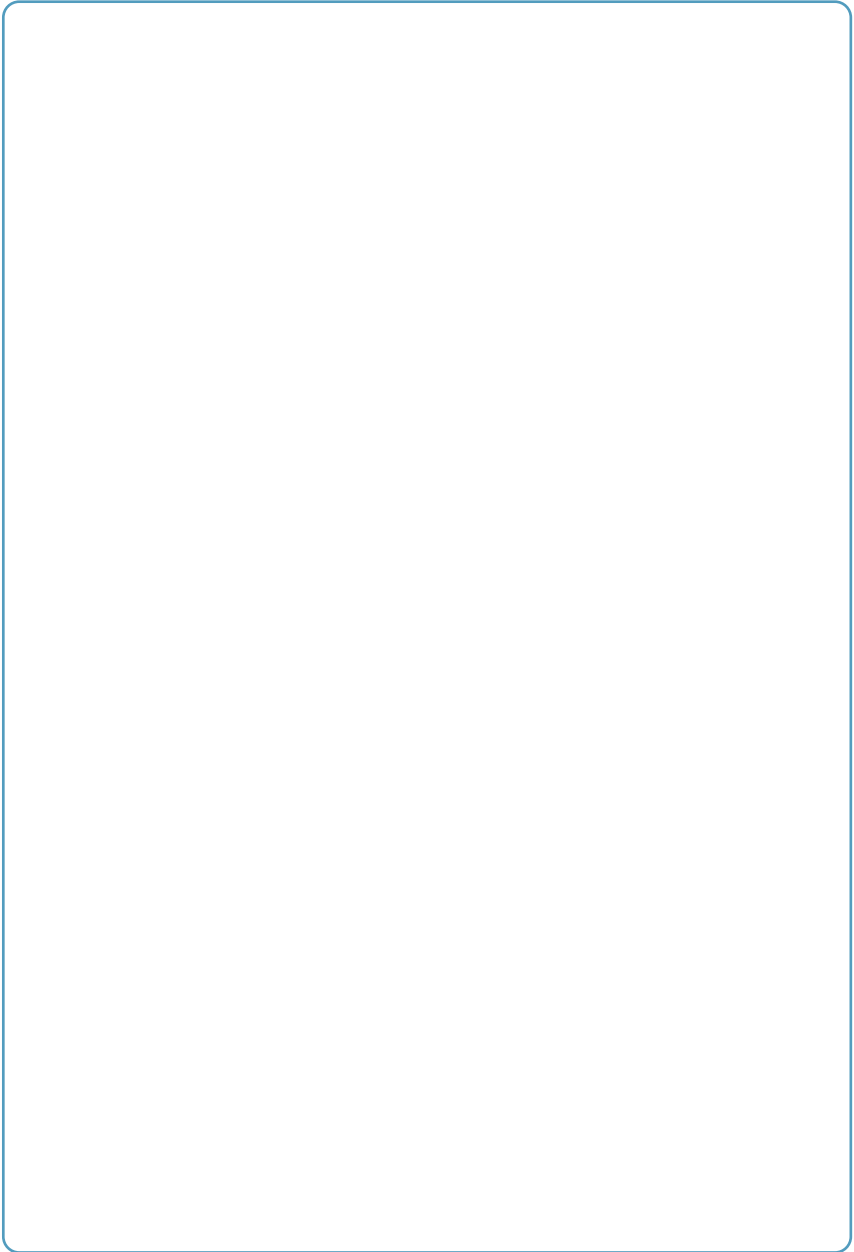


- How well do you understand your dreams?
- How do you celebrate your strengths and successes?
- How well aligned are your values, hopes and personal and professional practices?
- How do you maintain hope in your life?

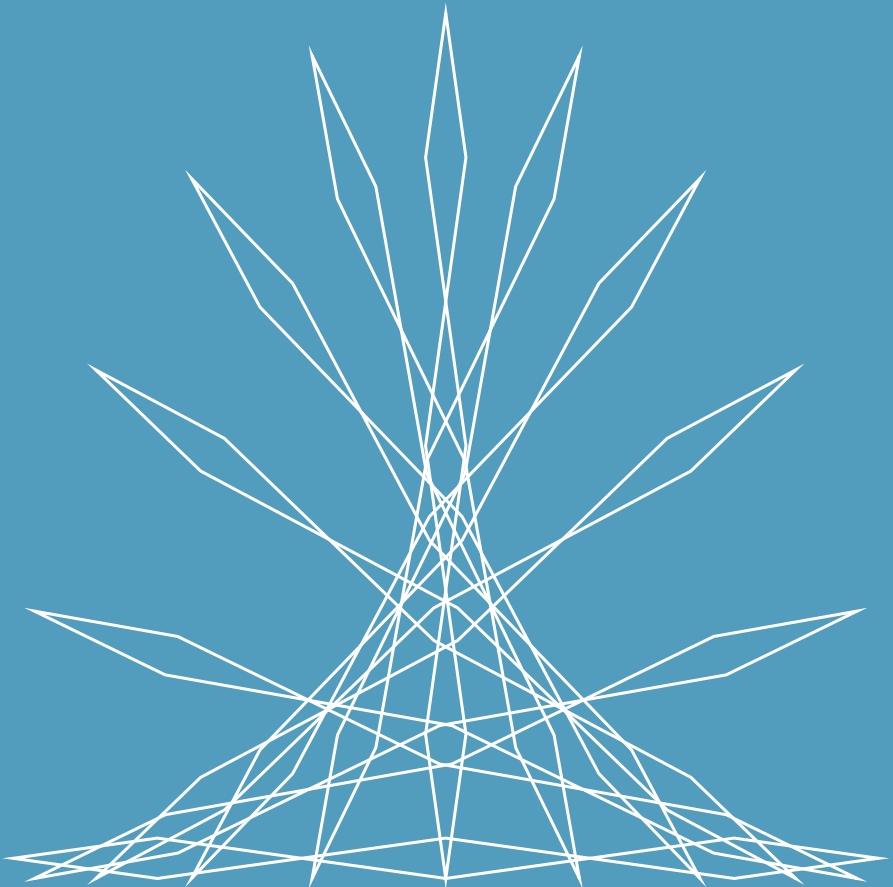
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## 4. Building Confidence







## 4. Building Confidence

To move from diagnosis of self as person and leader to developing strategies for development to action requires the formulation of specific strategies. Such strategies need to meet a range of criteria. They need to:

- build the confidence to support actions
- be specific to the individual
- enhance understanding
- be intrinsically motivated
- contribute to the development of personal wisdom

Leadership development has to focus on the capacity to act – to translate principle into practice. In the final analysis, leadership is about relationships and the modelling of appropriate behaviours at personal and professional levels.

Leadership development might thus be seen as a relationship between the need to foster authenticity and to recognise the complexity of dealing with the higher order dimensions of personal and leadership development.

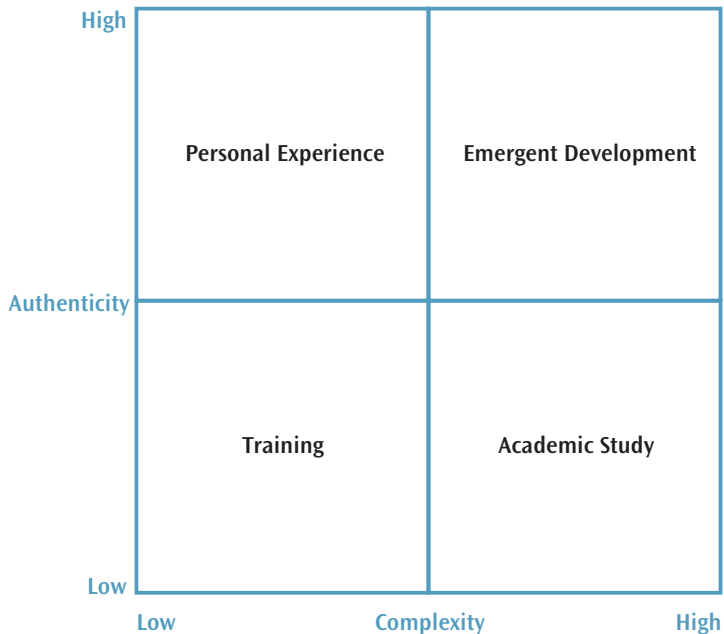


Figure 4: Learning, authenticity and complexity

Figure 4 explores the relationship between learning, complexity and authenticity. Where authenticity and complexity are both low then traditional training will suffice, as it is essentially the delivery of generic information. High complexity but low personal authenticity is covered by most types of academic study, ie abstract learning that may or may not inform personal behaviour. High authenticity combined with low complexity is characterised by many aspects of personal experience but this may not be mediated by reflection. High authenticity and high complexity requires strategies that focus on emergent development, ie deep and profound learning.

While training, academic study and personal experience are all significant sources of personal and professional learning, it is only when they are integrated with emergent development strategies that they are likely to impact on actual practice. Such impact is most likely to be effective when the strategy is personal to the individual and allows for individual discretion.

Learning is a social relationship - the movement from shallow to deep learning is the movement from dependency to interdependency: from a hierarchical, controlling relationship to one based on trust, reciprocity and mutual, supportive growth. There are numerous permutations of this relationship but they all operate within Vygotsky's concept of the 'zone of proximal development' - any person's potential to grow, learn and develop is contingent on a social relationship. The central characteristic of any such relationship is confidence, which is based on trust and which in turn creates confidence in the learner. In this context, status is less significant than the effectiveness of the relationship. It was a slave who reminded Roman generals in the celebration of their triumphs, 'Sic transit gloria mundi' ('Thus passes the glory of the world'). The successful learning relationship is based on trust, confidentiality and, crucially, challenge and questioning. Challenge and questioning will take a variety of forms depending on the particular relationship. The range of possible relationships is shown in Figure 5.

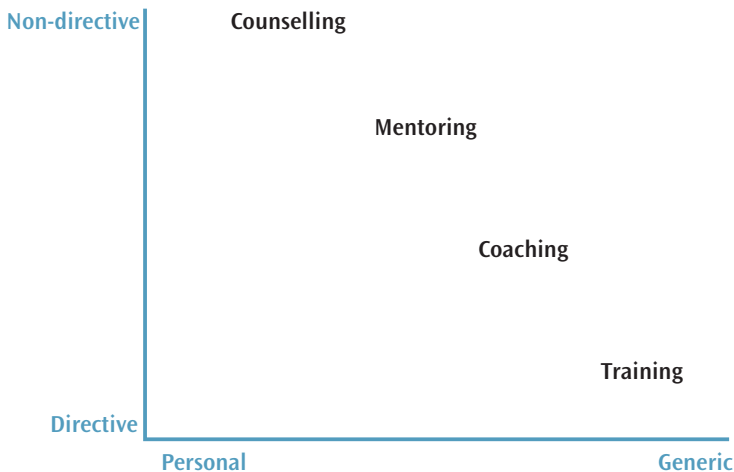


Figure 5: A typology of helping strategies

The characteristics of authentic learning relationships may be summarised as follows.

- **Counselling:** highly personal and largely non-directive, designed to facilitate the emergence of understanding in the most personal aspects of personal effectiveness, growth and development.
- **Mentoring:** focusing on the affective dimension of professional effectiveness through supported reflection, challenge and the development and review of behavioural strategies.
- **Coaching:** strategies that support intervention in specific aspects of professional skills and behaviour.
- **Training:** the provision of generic skills; activities to build skills and strategies relating to particular and specific aspects of the role of leader.

For any of these learning relationships to work, there needs to be a number of specific characteristics in place.

- **Challenge:** not in the confrontational sense, but rather asking the fundamental questions or posing problems. Challenge is fundamental to deep and profound learning and it is axiomatic to authentic personal development - 'A life unexamined is not worth living' (Socrates). The primary purpose of challenge is to stimulate analysis, to promote explanation and so support the achievement of understanding.
- **Feedback:** this is a key strategy in all helping relationships. Its primary purpose is to provide informed, objective advice, based on evidence to support analysis of actual performance. Effective feedback needs to be specific, focused, detailed, systematic and challenging. Feedback tends to work best within an agreed agenda and as part of a developmental strategy.

- **Reflection:** this is central to the development of deep and profound learning, is pivotal to successful professional practice and yet is the most elusive aspect of leadership learning. Reflection is about self-directed, structured analysis of behaviour, ideas, situations, practice or relationships, and is primarily concerned with making sense of and ordering evidence or other stimuli. The purpose of reflection is to inform future thinking and so action. Reflection is enhanced by support, but to be sustainable and authentic needs to be increasingly self-directed and owned.
- **Developing strategies:** one of the most important characteristics of a helping relationship is the proposing of alternative ways of working, the introduction of new ideas, suggesting different strategies and building alternative scenarios.

Each of these strategies is appropriate to all helping relationships - the extent to which they are used and the way in which they are employed will depend on the maturity of the relationship, its purpose and the context.

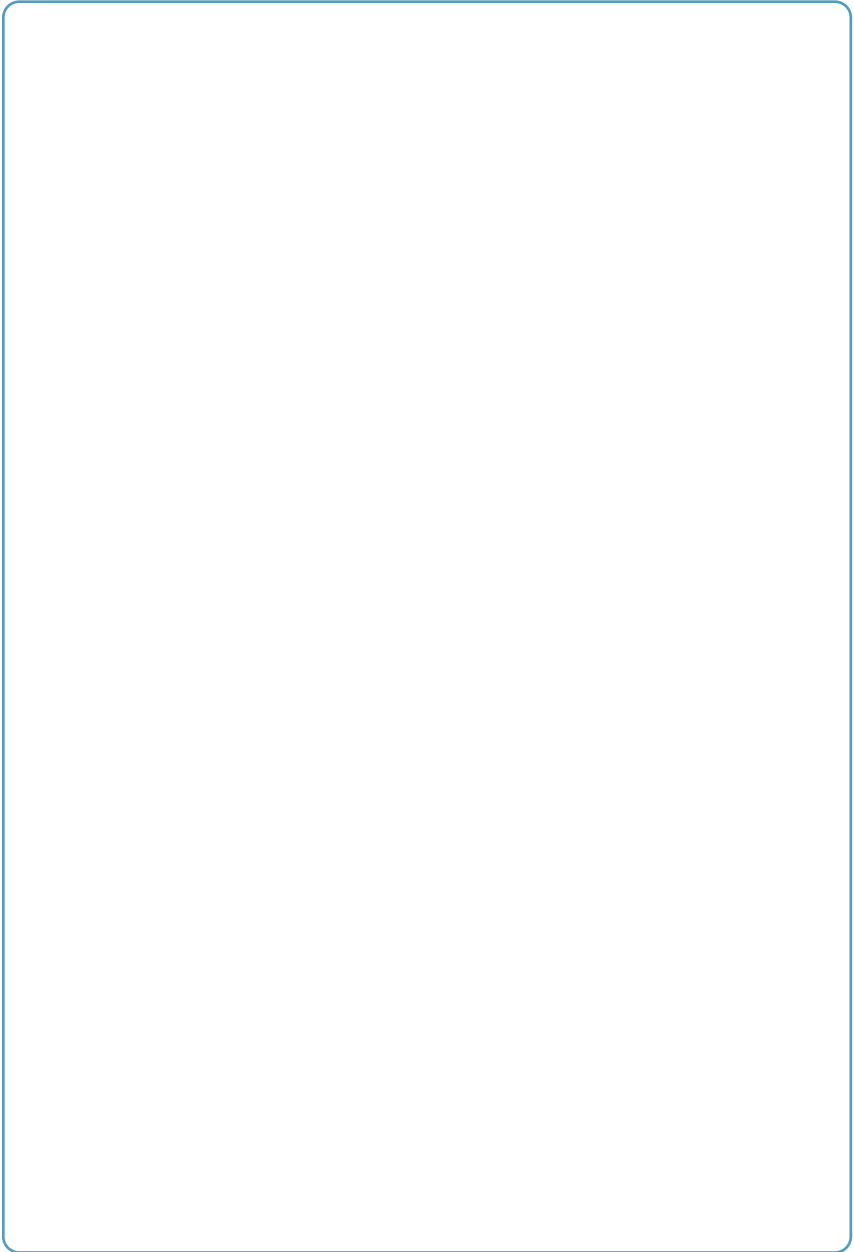
# The Fourth Discovery

## Experimenting with new behaviour

What strategies can I put in place and how do I develop mastery?

- What criteria do you use to judge your effectiveness?
- How rich is your portfolio of developmental strategies?
- Are you comfortable experimenting with new approaches and strategies?
- Do you have a long-term mentoring relationship as part of your professional development strategy?

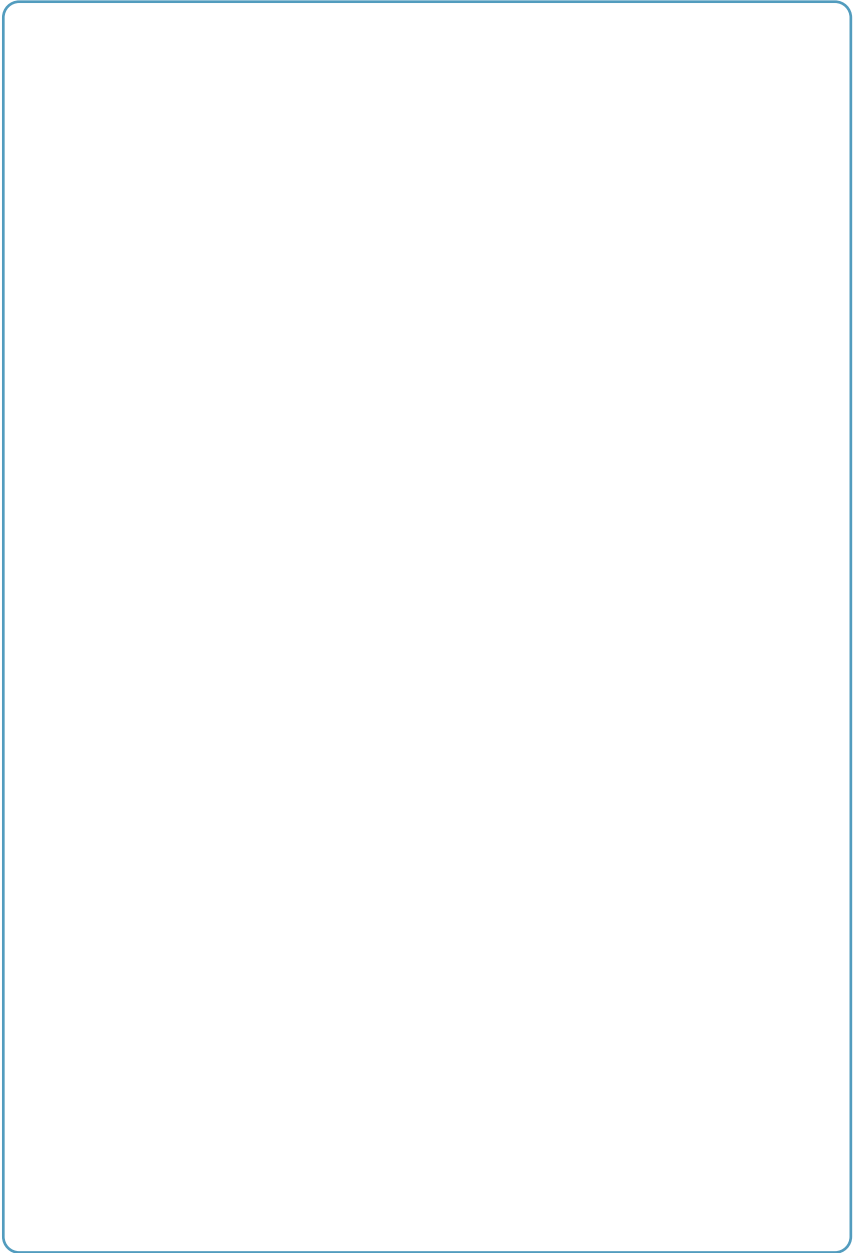
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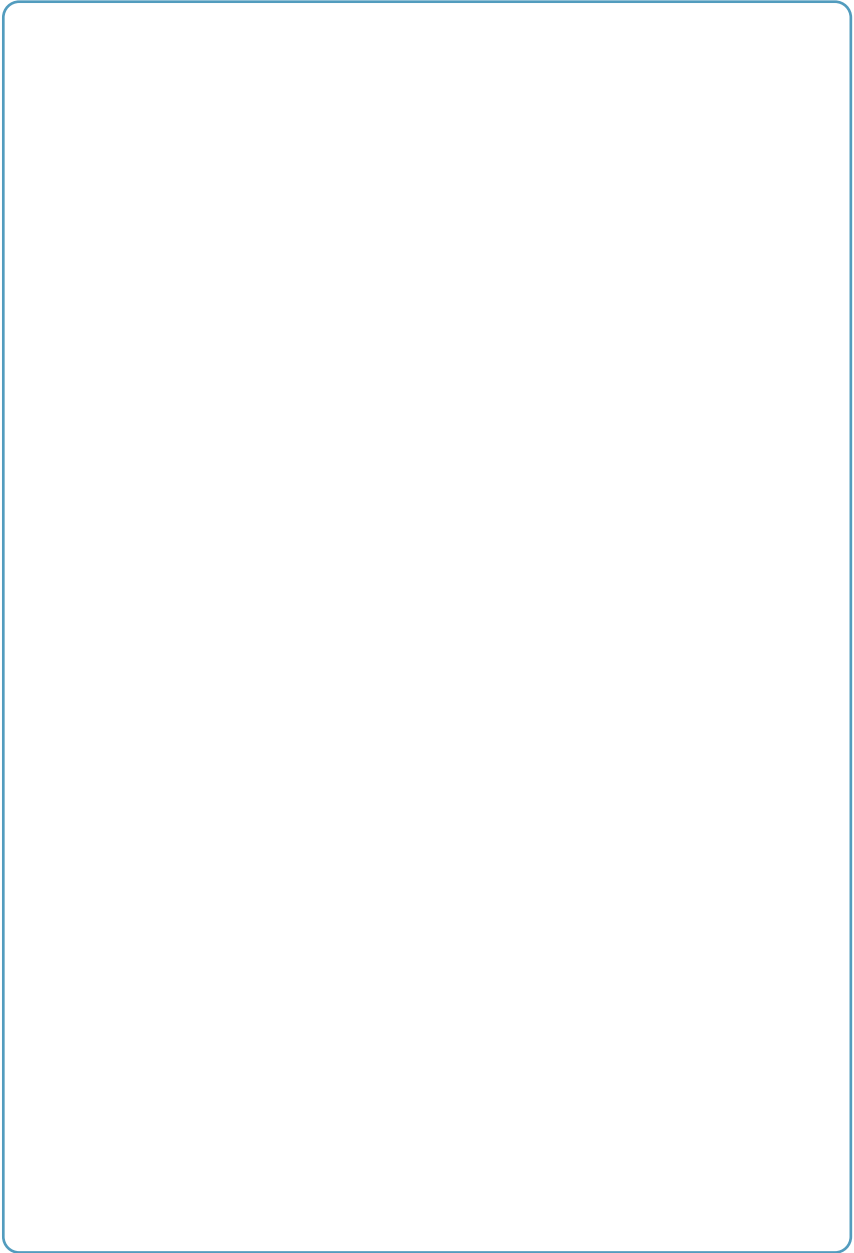
- How confident are you in reflecting on your practice?
- How comfortable are you in getting feedback from others?
- What strategies do you use to identify your developmental agenda?
- Are you comfortable with risk-taking and public failure?
- Are you open to challenge?



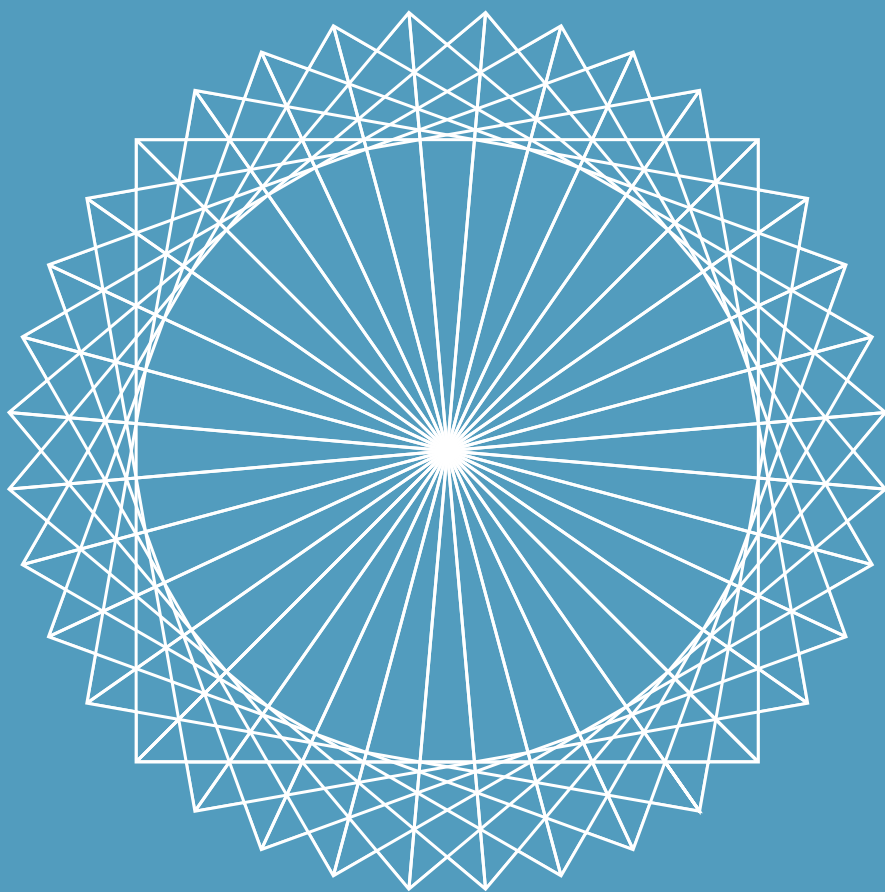
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## 5. Learning Through Authentic Relationships





## 5. Learning Through Authentic Relationships

Relationships are the basis of all learning. Our earliest development is based on relationships with our parents and family; who are more significant than any other factor in our early learning. Throughout our lives, it is the richness and complexity of our relationships that determine our growth, learning and development. It is difficult to conceptualise any aspect of our development that is not enhanced through interaction with other human beings. The South African concept of ubuntu captures the relationship between self and community in the definition that 'a person is a person through other persons'. As Archbishop Desmond Tutu (2000) expresses it:

**A person with ubuntu is open and available to others, affirming of others, does not feel threatened that others are able and good, for he or she has a proper self-assurance that comes from knowing that he or she belongs in a greater whole. (Tutu, 2000, p.43)**

Leadership development is rooted in such relationships just as in personal development. The effectiveness of such development is directly proportionate to the authenticity of the relationship. Authentic relationships may be said to have the following characteristics:

- high levels of trust
- consistency over time
- genuine respect, regard and affection
- openness, honesty, frankness
- the ability to challenge without threat
- shared values and commitment to mutual well-being

Authenticity is thus a product of the capacity of an individual to explore what it means to be me and to recognise that becoming me is, in itself, a social process. It is through social relationships that the movement to authenticity is most powerfully expressed, but this is not a passive process:

**[Leaders] are proactive and seek out whatever support they need, wherever they can find it. They are so determined to learn, to change, and to shape their experiences that whatever the situation in which they find themselves they will find a way to increase the complexity of their lives. (Csikszentmihalyi, 2003, p.81)**

Watkins et al (2000) extend this notion of complexity:

**We might conceptualise the person as their cluster of relationships, thinking of them as a node in a web of relationships. Similarities and differences in the features of this web (its extent, the quality of relationship, degree of connectedness and so on) turn out to make sense of many important similarities and differences between people, of the changes that may occur in their lives, and also of how change can be made in their lives. (Watkins et al, 2000, p.70)**

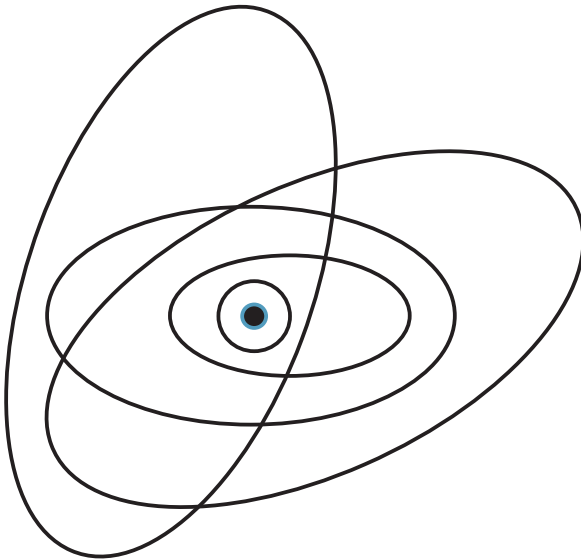
Watkins et al go on to describe 'relational embeddedness' as being crucial to the development of any individual. Leaders need to cultivate a rich, complex and highly interactive cluster of networked relationships - the richer and more complex the range of authentic networks, the more likely is effective learning and development.

It would be impossible to identify all the permutations of relationships available to an individual leader. However, some of the most significant might include:

- immediate family, most notably a partner who will often embody authenticity
- friends in a variety of social contexts
- colleagues at work, and at best, the leadership team
- various networks of school leaders
- mentors, coaches, advisers and consultants working in a variety of supportive ways
- informal contacts at courses and conferences

Each of these relationships has the potential to contribute to the development and learning of a leader: who and what will be determined by time, context and need. There is probably a correlation between the sophistication of an individual's networks and their effectiveness as a leader. A useful criterion for such relationships and networks might be the concept of 'fitness for purpose'; an individual is able to draw on a rich repertoire of helping relationships to meet the ever-increasing complexity of the role of school leader. The essential characteristic is that they should all, in their various ways, be authentic. Any person's network of relationships will inevitably be highly complex and subject to a wide range of influences and forces, rather like the interaction of planets in a solar system.

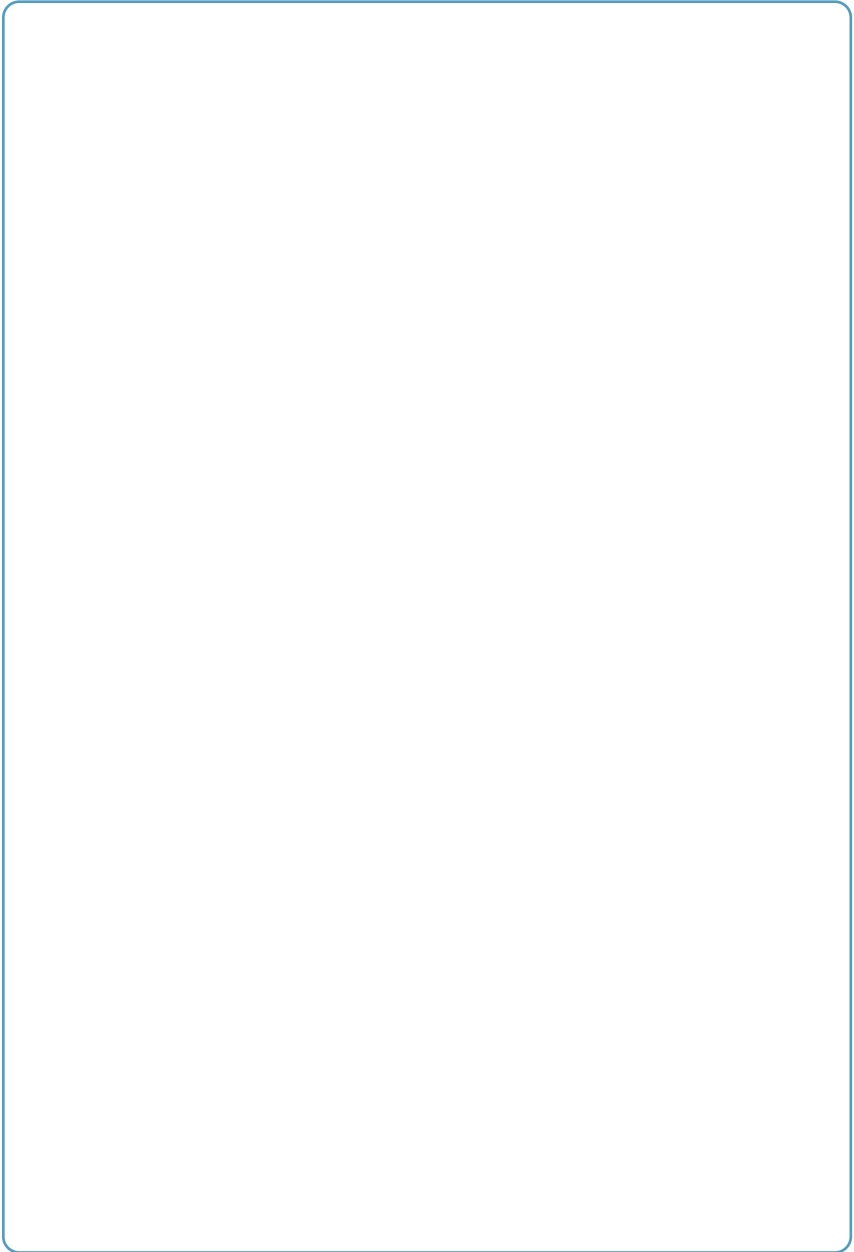
Figure 6: The orrery of relationships



Our relationships with those who can help us might be thought of as an orrery – the three-dimensional working models of the solar system in which the relationship between the sun, planets and moons are in a state of constant interaction. Think of yourself as the sun – there are some planets that are in a permanently close orbit. These are our closest relationships, in a state of interdependence and constant interaction. There are other relationships that are not as close but are important and that exert a significant influence. Other planets may come close only once in a while, become an influential factor, then move on. From time to time of course there may be a conjunction of ‘planets’ that can exert particularly strong forces. There are of course others that will exert only a remote and distant influence. A vital factor in developing your own ‘solar system’ of helping relationships is to understand the relative significance of each ‘planet’ in your life.



# Notes

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# The Fifth Discovery

## Developing supportive and trusting relationships to make change possible

### Who can help me?

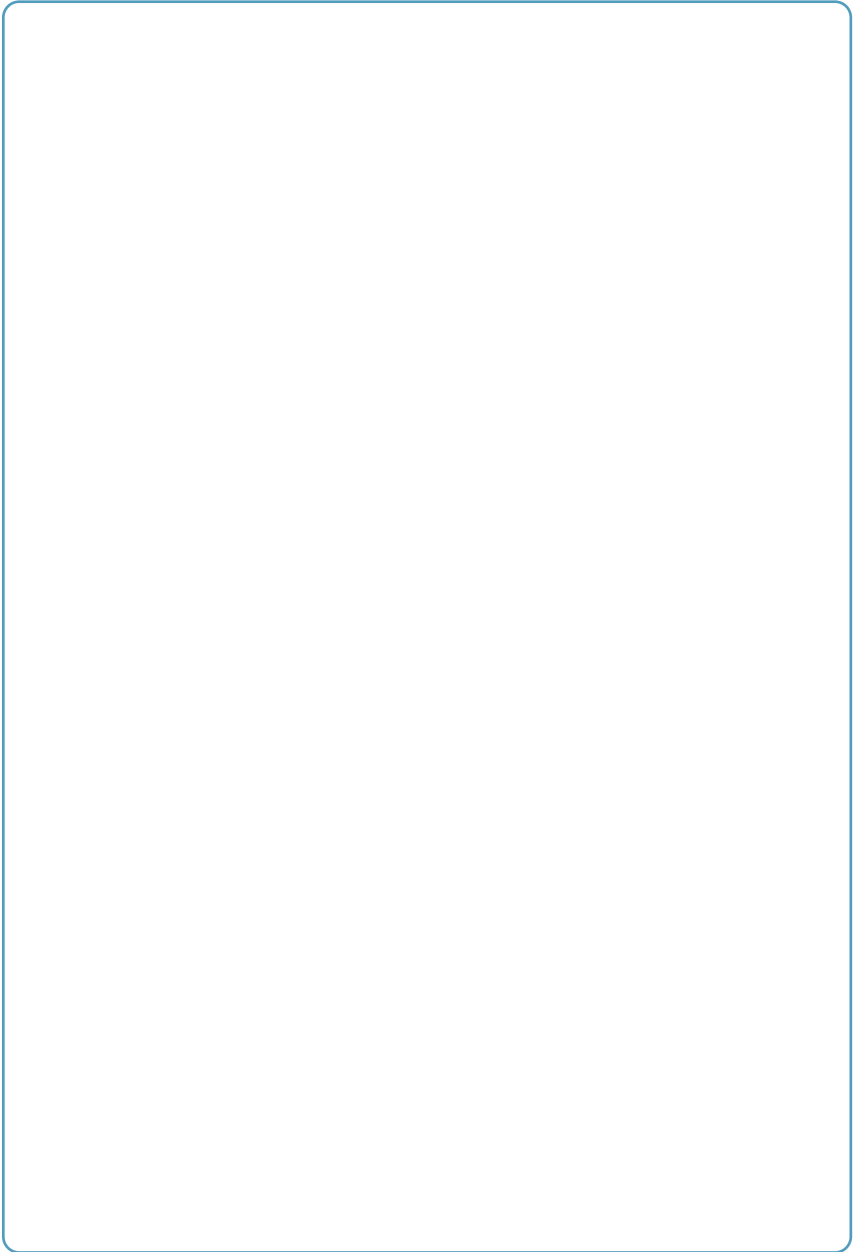
- What have been the most significant learning relationships in your life?
  
- How would you describe the most powerful influences on your successful relationships?
  
- What are the practical manifestations of a relationship based on trust?
  
- Consider the full portfolio of your friendships and relationships – are all your needs being met?

# Notes

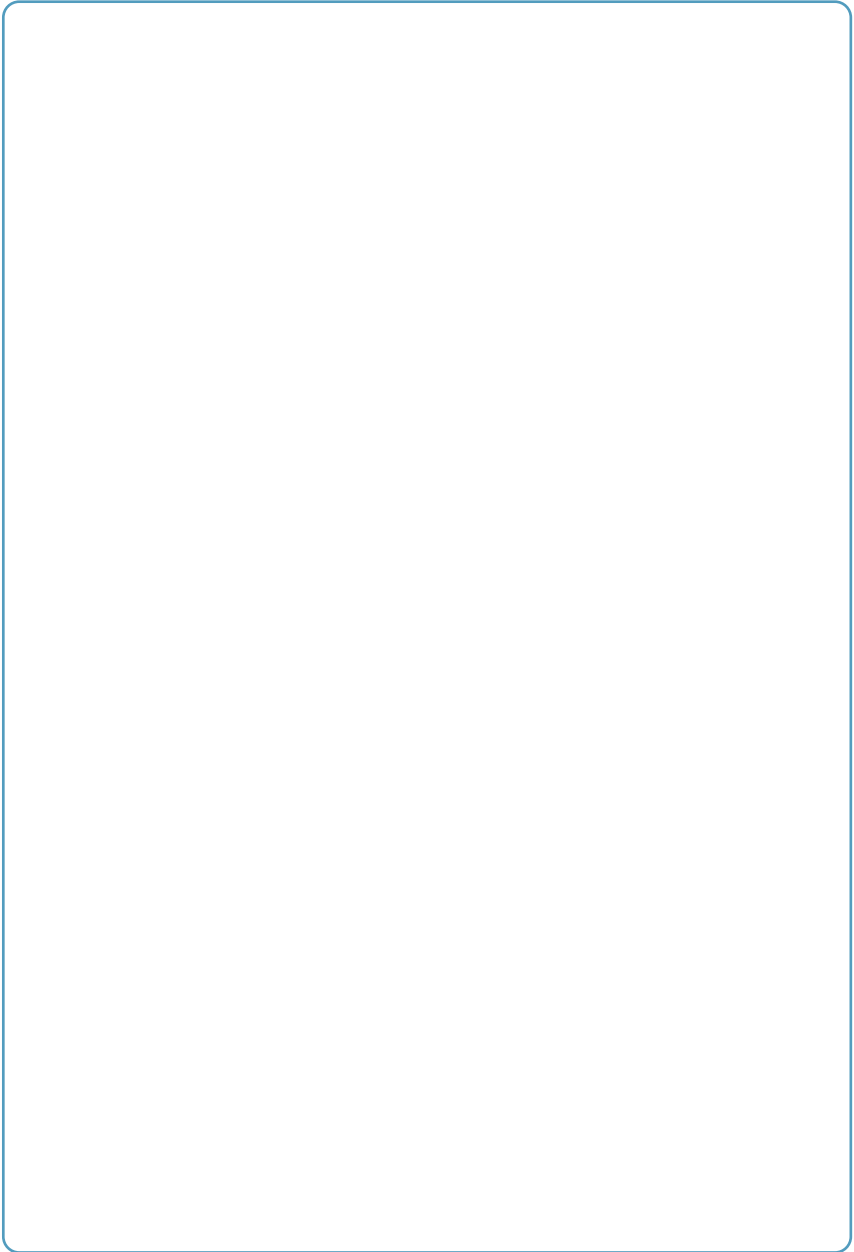
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# Notes



# Notes



## 6. Appendices





# Appendix 1:

## Learning styles inventory

One of the factors that will help you in your successful completion of this review is an understanding of how you learn. This will help you to formulate a strategy for every aspect of your personal leadership development.

The learning styles inventory was developed by Dr Peter Honey and Professor Alan Mumford. It is included with their permission, which is gratefully acknowledged. The inventory is for your use only and should not be copied. This activity is purely to help your personal planning.

There is no time limit to this questionnaire, but it will probably take you 10-15 minutes. The accuracy of the results depends on how honest you can be. There are no right or wrong answers. If you agree with a statement more than you disagree with it, put a tick by it. If you disagree more than you agree, put a cross by it.

**Be sure to mark each item with either a tick or a cross.**

- 1 I have strong beliefs about what is right and wrong, good and bad.
- 2 I often act without considering the possible consequences.
- 3 I tend to solve problems using a step-by-step approach.
- 4 I believe that formal procedures and policies restrict people.
- 5 I have a reputation for saying what I think, simply and directly.
- 6 I often find that actions based on feelings are as sound as those based on careful thought and analysis.
- 7 I like the sort of work where I have time for thorough preparation and implementation.

- 8 I regularly question people about their basic assumptions.
- 9 What matters most is whether something works in practice.
- 10 I actively seek out new experiences.
- 11 When I hear about a new idea or approach I immediately start working out how to apply it in practice.
- 12 I am keen on self-discipline such as watching my diet, taking regular exercise, sticking to a fixed routine, etc.
- 13 I take pride in doing a thorough job.
- 14 I get on best with logical, analytical people and less well with spontaneous, 'irrational' people.
- 15 I take care over the interpretation of data available to me and avoid jumping to conclusions.
- 16 I like to reach a decision carefully after weighing up many alternatives.
- 17 I'm attracted more to novel, unusual ideas than to practical ones.
- 18 I don't like disorganised things and prefer to fit things into a coherent pattern.
- 19 I accept and stick to laid down procedures and policies so long as I regard them as an efficient way of getting the job done.

- 20 I like to relate my actions to a general principle.
- 21 In discussions I like to get straight to the point.
- 22 I tend to have distant, rather formal relationships with people at work.
- 23 I thrive on the challenge of tackling something new and different.
- 24 I enjoy fun-loving, spontaneous people.
- 25 I pay meticulous attention to detail before coming to a conclusion.
- 26 I find it difficult to produce ideas on impulse.
- 27 I believe in coming to the point immediately.
- 28 I am careful not to jump to conclusions too quickly.
- 29 I prefer to have as many sources of information as possible - the more data to think over, the better.
- 30 Flippant people who don't take things seriously enough usually irritate me.
- 31 I listen to other people's points of view before putting my own forward.

- 32 I tend to be open about how I'm feeling.
- 33 In discussions I enjoy watching the manoeuvrings of the other participants.
- 34 I prefer to respond to events on a spontaneous, flexible basis rather than plan things out in advance.
- 35 I tend to be attracted to techniques such as network analysis, flow charts, branching programmes, contingency planning, etc.
- 36 It worries me if I have to rush out a piece of work to meet a tight deadline.
- 37 I tend to judge people's ideas on their practical merits.
- 38 Quiet, thoughtful people tend to make me uneasy.
- 39 I often get irritated by people who want to rush things.
- 40 It is more important to enjoy the present moment than to think about the past or future.
- 41 I think that decisions based on thorough analysis of all the information are sounder than those based on intuition.
- 42 I tend to be a perfectionist.
- 43 In discussions I usually produce lots of spontaneous ideas.

- 44 In meetings I put forward practical ideas.
- 45 More often than not, rules are there to be broken.
- 46 I prefer to stand back from a situation and consider all the perspectives.
- 47 I can often see inconsistencies and weaknesses in other people's arguments.
- 48 On balance I talk more than I listen.
- 49 I can often see better, more practical ways to get things done.
- 50 I think written reports should be short and to the point.
- 51 I believe that rational, logical thinking should win the day.
- 52 I tend to discuss specific things with people rather than engaging in social discussions.
- 53 I like people who approach things realistically rather than theoretically.
- 54 In discussions I get impatient with irrelevancies and digressions.
- 55 If I have a report to write I tend to produce lots of drafts before settling the final version.

- 56 I am keen to try things out to see if they work in practice.
- 57 I am keen to reach answers via a logical approach.
- 58 I enjoy being the one that talks a lot.
- 59 In discussions I often find I am the realist, keeping people to the point and avoiding wild speculations.
- 60 I like to ponder many alternatives before making up my mind.
- 61 In discussions with people I often find I am the most dispassionate and objective.
- 62 In discussions I'm more likely to adopt a 'low profile' than to take the lead and do most of the talking.
- 63 I like to be able to relate current actions to a longer term bigger picture.
- 64 When things go wrong I am happy to shrug it off and 'put it down to experience'.
- 65 I tend to reject wild, spontaneous ideas as being impractical.
- 66 It's best to think carefully before taking action.
- 67 On balance I do the listening rather than the talking.

- 68 I tend to be tough on people who find it difficult to adopt a logical approach.
- 69 Most times I believe the end justifies the means.
- 70 I don't mind hurting people's feelings so long as the job gets done.
- 71 I find the formality of having specific objectives and plans stifling.
- 72 I'm usually the one who puts life into a party.
- 73 I do whatever is expected to get the job done.
- 74 I quickly get bored with methodical, detailed work.
- 75 I am keen on exploring the basic assumptions, principles and theories underpinning things and events.
- 76 I'm always interested to find out what other people think.
- 77 I like meetings to be run on methodical lines, sticking to laid down agenda etc.
- 78 I steer clear of subjective or ambiguous topics.
- 79 I enjoy the drama and excitement of a crisis situation.
- 80 People often find me insensitive to their feelings.

## Scoring

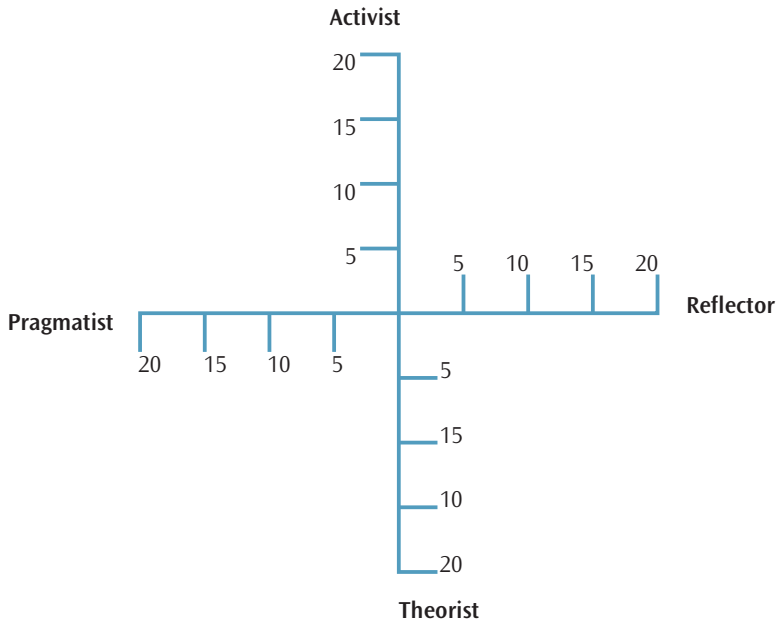
Ignore those items that you marked with a (X). Circle the number of items that you marked with a (✓). Total the number of circles in each column.

2	7	1	5
4	13	3	9
6	15	8	11
10	16	12	19
17	25	14	21
23	28	18	27
24	29	20	35
32	31	22	37
34	33	26	44
38	36	30	49
40	39	42	50
43	41	47	53
45	46	51	54
48	52	57	56
58	55	61	59
64	60	63	65
71	62	68	69
72	66	75	70
74	67	77	73
79	76	78	80

Totals:      
Activist      Reflector      Theorist      Pragmatist



Now you enter your scores on the appropriate arm of the diagram below and link your scores to form a kite shape.



It is important to stress that there is no correct profile. The important thing is to be aware of your profile and its implications and to develop your capacity to learn in various ways.

# Learning Styles:

## General Description

### Activists

Activists involve themselves fully without bias in new experiences. They enjoy the here and now and are happy to be dominated by immediate experiences. They are open-minded, not sceptical, and this tends to make them enthusiastic about anything new. Their philosophy is “I’ll try anything once”. They tend to act first and consider the consequences afterwards. Their days are filled with activity. They tackle problems by brainstorming. As soon as the excitement from one activity has died down, they are busy looking for the next. They tend to thrive on the challenge of new experiences but are bored with implementation and longer term consolidation. They are gregarious people, constantly involving themselves with others but, in doing so, they seek to centre all activities on themselves.

### Reflectors

Reflectors like to stand back to ponder experiences and observe them from many different perspectives. They collect data, both first-hand and from others, and prefer to think about it thoroughly before coming to any conclusion. The thorough collection and analysis of data about experiences and events are what count so they tend to postpone reaching definitive conclusions for as long as possible. Their philosophy is to be cautious. They are thoughtful people who like to consider all possible angles and implications before making a move. They prefer to take a back seat in meetings and discussions. They enjoy observing other people in action. They listen to others and get the drift of the discussion before making their own points. They tend to adopt a low profile and have a slightly distant, tolerant, unruffled air about them. When they act it is part of a wide picture which includes the past as well as the present and others’ observations as well as their own.

## Theorists

Theorists adapt and integrate observations into complex but logically sound theories. They think problems through in a vertical, step-by-step logical way. They assimilate disparate facts into coherent theories. They tend to be perfectionists who won't rest easy until things are tidy and fit into a rational scheme. They like to analyse and synthesise. They are keen on basic assumptions, principles, theories, models and systems thinking. Their philosophy prizes rationality and logic: "If it's logical, it's good". Questions they frequently ask are: "Does it make sense?", "How does this fit and with what?" and "What are the basic assumptions?". They tend to be detached, analytical and dedicated to rational objectivity rather than anything subjective or ambiguous. Their approach to problems is consistently logical. This is their mental set and they rigidly reject anything that doesn't fit with it. They prefer to maximise certainty and feel uncomfortable with subjective judgements, lateral thinking and anything flippant.

## Pragmatists

Pragmatists are keen on trying out ideas, theories and techniques to see if they work in practice. They positively search out new ideas and take the first opportunity to experiment with applications. They are the sort of people who return from management courses brimming with new ideas that they want to try out in practice. They like to get on with things and act quickly and confidently on ideas that attract them. They tend to be impatient with ruminating and open-ended discussions. They are essentially practical, down-to-earth people who like making practical decisions and solving problems. They respond to problems and opportunities "as a challenge". Their philosophy is: "There is always a better way" and "If it works, it's good".

# Characteristics of the Learning Styles

## Activists

**Activists learn best from activities where:**

- there are new experiences, problems and opportunities from which to learn
- they can engross themselves in short, here-and-now activities such as business games, competitive teamwork tasks and role-play exercises
- there is excitement, drama or a crisis and things chop and change with a range of diverse activities to tackle
- they have a lot of limelight or high visibility, ie they can chair meetings, lead discussions or give presentations
- they are allowed to generate ideas without constraints of policy or structure or feasibility
- they are thrown in at the deep end with a task they think is difficult, ie when set a challenge with inadequate resources and adverse conditions
- they are involved with other people, ie bouncing ideas off them or solving problems as part of a team
- it is appropriate to 'have a go'

**Activists learn least from, and may react against, activities where:**

- learning involves a passive role, ie listening to lectures, monologues, explanations, statements of how things should be done, and reading and watching
- they are asked to stand back and not be involved
- they are required to engage in solitary work, ie reading, writing, thinking on their own
- they are asked to assess beforehand what they will learn, and to appraise afterwards what they have learned
- they are offered statements they see as theoretical, ie explanation, cause, background
- they are asked to repeat essentially the same activity over and over again, ie when practising
- they have precise instructions to follow with little room for manoeuvre
- they are asked to do a thorough job, ie attend to detail, tie up loose ends, dot the is, cross the ts

# Reflectors

## **Reflectors learn best from activities where:**

- they are allowed or encouraged to watch, think and chew over activities
- they are able to stand back from events and listen or observe, ie observing a group at work, taking a back seat in a meeting or watching a film or video
- they are allowed to think before acting and to assimilate before commenting, ie time to prepare, a chance to read in advance a brief giving background data
- they can carry out some painstaking research, ie investigate, assemble information, probe to get to the bottom of things
- they have the opportunity to review what has happened and what they have learned
- they are asked to produce carefully considered analyses and reports
- they are helped to exchange views with other people without danger, ie by prior agreement, within a structured learning experience
- they can reach a decision in their own time without pressure and tight deadlines

**Reflectors learn least from, and may react against, activities where:**

- they are forced into the limelight, ie to act as leader, chair, to role-play in front of onlookers
- they are involved in situations that require action without planning
- they are pitched into doing something without warning, ie to produce an instant reaction, produce an off-the-top-of-the-head idea
- they are given insufficient data on which to base a conclusion
- they are given cut and dried instructions of how things should be done
- they are worried by time pressures or rushed from one activity to another
- in the interest of expediency, they have to make short cuts or do a superficial job

# Theorists

## **Theorists learn best from activities where:**

- what is being offered is part of a system, model, concept or theory
- they have time to explore methodically the associations and inter-relationships between ideas, events and situations
- they have the chance to question and probe the basic methodology, assumptions or logic behind something, ie by taking part in a question-and-answer session, checking a paper for inconsistencies
- they are intellectually stretched, ie by analysing a complex situation, being tested in a tutorial session, teaching high-calibre people who ask searching questions
- they are in structured situations with a clear purpose
- they can listen to or read about ideas and concepts that emphasise rationality or logic and are well argued, elegant or watertight
- they can analyse and then generalise the reasons for success or failure
- they are offered interesting ideas and concepts even though they are not immediately relevant
- they are required to understand and participate in complex situations



**Theorists learn least from, and may react against, activities where:**

- they are pitched into doing something without a context or apparent purpose
- they have to participate in situations emphasising emotions and feelings
- they are involved in unstructured activities where ambiguity and uncertainty are high, ie with open-ended problems, sensitivity training
- they are asked to act or decide without a basis in policy, principle or concept
- they are faced with a hotchpotch of alternative or contradictory techniques or methods without exploring any in depth, ie as on a 'once-over-lightly' course
- they doubt that the subject matter is methodologically sound, ie where questionnaires haven't been validated, where there aren't any statistics to support an argument
- they find the subject matter platitudinous, shallow or gimmicky
- they feel themselves out of tune with other participants, ie when with lots of activists or people of lower intellectual calibre

# Pragmatists

## **Pragmatists learn best from activities where:**

- there is an obvious link between the subject matter and a problem or opportunity on the job
- they are shown techniques for doing things with obvious practical advantages, ie how to save time, how to make a good first impression, how to deal with awkward people
- they have the chance to try out and practise techniques with coaching or feedback from a credible expert, ie someone who is successful and can do the techniques themselves
- they are exposed to a model they can emulate, ie a respected boss, a demonstration from someone with a proven track record, lots of examples or anecdotes or a film showing how it's done
- they are given techniques that are currently applicable to their own job
- they are given immediate opportunities to implement what they have learned
- there is high face validity in the learning activity, ie a good simulation, real problems
- they can concentrate on practical issues, ie drawing up action plans with an obvious end product, suggesting short cuts and giving tips

**Pragmatists learn least from, and may react against, activities where:**

- the learning is not related to an immediate need they recognise or they cannot see an immediate relevance or practical benefit
- organisers of the learning or the event itself seem distant from reality, ie ivory-towered, all theory and general principles or pure 'chalk-and-talk'
- there is no practice or clear guidelines on how to do it
- they feel that people are going round in circles and not getting anywhere fast enough
- there are political, managerial or personal obstacles to implementation
- there is no apparent reward from the learning activity, ie more sales, shorter meetings, higher bonus, promotion



- What are the situations in which you are less likely to learn?
- 
- 4 Examine the characteristics of your lowest scoring style.  
What sorts of behaviour might help you to develop this style?
- 
- 5 With the help of your mentor, explore work-based activities that will help you practise the characteristics.

6 What are the implications of your learning style profile for:

- working alone?
- text-based learning?
- effective activities?
- critical and analytical work?
- research and data collection?
- writing at length?

- being assessed?
- receiving feedback?
- studying theory?
- leading change?

7. Identify those areas where you feel that you will need to develop your learning characteristics and what sort of action you feel is appropriate.

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