INSIGHTful DISCUSSIONS

MEASURING LEARNING AGILITY IN A MORE COMPLEX WORLD

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Boards of directors, CEOs and other executives who make key hiring decisions need to find and develop agile leaders.

Dr. Warner Burke, a professor at Teachers College at Columbia University, developed the Burke Learning Agility Inventory to help organizations identify these leaders.

Learning agility, as defined by Dr. Burke, concerns seeking new experiences and remembering them. Agile learning means dealing with new experiences flexibly and rapidly by trying new behavior, getting feedback on these attempts and making quick adjustments so new learning will be realized when you do not know exactly what to do.

In the discussion below, Dr. Burke and four other Human Resources leaders talk about learning agility and the Burke Learning Agility Inventory.

Why has learning agility become such an important topic in organizations today?

DR. WARNER BURKE: One reason is that people have slowly begun to realize that selecting high-potential leaders is complicated. Technical ability doesn't predict leadership effectiveness, for example. Also, the geometric rate of change has placed a premium on learning how to keep up with increasing complexity. Moreover, it seems that the mantra "what got you here will not get you there" has become an accepted cliché. How flexibly and fast one can learn is likely to become

the primary criterion for selection. Selection for what? You name it.

DR. TOMAS CHAMORRO-PREMUZIC: The term is catchy and sexy, even if most people don't know what it means. I think the premise is that the world is more uncertain and you need to be adaptable; learning agility seems to address this. In many ways it is just a rebranding of individual differences that will always matter.

DR. TODD VANNEST: Value … period! Over the past three decades, industry has aimed at developing learning organizations. Companies invested a great deal in either delegating learning to a (macro) solution, such as systems and processes, or a micro (leader behavior) solution. The rapidity and nature of change reveals the opportunity cost that exists when emphasis is put on learning. When you examine possible solutions from a "build versus buy" perspective, these approaches may not be the best use of capital. If instead we were to select leaders, identify and cultivate high-potential leaders, and optimize our investment in training or learning resources based on a measurable, demonstrated learning agility within our talent base, our realization of value would be much greater.

DR. ALLAN CHURCH: Two key reasons that it's become important from my vantage point as an internal Talent Management leader are the nature of organizational change and limited resources:

a) The pace of organizational change requires leaders with learning agility. The speed of change and VUCA (volatility, uncertainty, complexity and ambiguity) nature of the global business ecosystem means that organizations are under constant pressure to identify, develop against and fill critical capability gaps to deliver sustained business growth. Unfortunately, determining those future leadership capabilities that will be needed is a moving target, and as a result, organizations need leaders with the energy and ability to adapt and learn in new and novel situations. Those individuals who can learn from experiences, convert them to new knowledge, and apply that knowledge will be the most successful in the future. As requirements change on a dime, they will be the best prepared to adapt and lead the organization forward.

b) Learning agile leaders will make the most of limited development resources. Although the war for talent still remains, there also is a war for resources in organizations today. By focusing on leaders with high learning agility, organizations have the best chance of making an impact with their development investments in those individuals for the long term. If you also connect to the motivational aspect of high-potential learning agility (noted in Church & Silzer[1]) you create high levels of employee engagement (and even some measure of loyalty) by giving these types of leaders new critical experiences. So it's a win-win if the company can get it right.

DAVID HOFF: Getting to this point has been evolutionary. I have been working in the people area for 40 years. The way people made promotion decisions in 1975 versus today is very different. If you wanted another general manager, you knew it took 20 years to grow one. You rotated the person through a series of jobs, usually without a lot of foresight about what he or she was supposed to learn. It just happened. Then things started to become more intentional. Strategy seemed to be the thing people needed to learn. Next it was global. Then it was the ability to manage change. Finally, we figured out it was really about learning agility. It's always been about learning agility. It just took us awhile to put our finger on it.

Does Warner Burke's definition of learning agility acceptably define this concept? What

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DR. WARNER BURKE

would you add, change or delete, if anything?

CHAMORRO-PREMUZIC: Yes, it does acceptably define this concept. It is more original, evidence-based and focused than any other definition I know. A breath of fresh air!

VANNEST: Yes, and the distinction of "agility" rather than "style" is important. In particular, I find great utility in the inclusion of or emphasis on flexibility and trying/assimilation as key elements. I see too many applications of learning styles take the path of personality "typing" tools, which tend to be over-applied and limit (intentionally or not) how we serve the learning leader. For example, "You're an INTJ or an 'auditory' learner" or such. Having worked with high-potential leaders across many organizations, I see Burke's definition as helping to distinguish those who demonstrate a real capacity for learning, and applying

learning for growth and value. They don't seek to "master" stuff, they seek to assimilate, test and play with it.

BURKE: There is nothing wrong with this definition except for people who are in a hurry, and those who score "S" on the Myers-Briggs Type Indicator Instrument – and for opposite reasons. For the former, two or three sentences is too much. For the latter, it is not enough, i.e., insufficient specificity. The four key elements are there – speed, flexibility, active by trying new behavior, and seeking feedback.

CHURCH: In general I think the definition of the construct as outlined makes sense. … I like the nine components … Is there a superstructure to the nine? Perhaps there are three to four buckets (learning agility "directions" or "vectors" or something) that the nine can roll in to? It would make for a compelling 1-3-9 model and allow a layered approach to feedback and development recommendations if you could figure it out. As I look at the nine, they seem to cluster into (a) acting/reacting on the environment, (b) action on people, and (c) acting on data/information.

HOFF: I am fine with the definition as it is. I would have thought intelligence (cognitive agility) would have been more important to learning agility, particularly as it relates to the dimension of speed. Warner has said clearly that there is a threshold of cognitive ability that is necessary, but beyond that point it is irrelevant.

Why would it be important to measure someone's learning agility?

HOFF: To me, it seems so obvious.

"A practitioner could easily pair (the BLAI) with a 360-feedback tool to explore linkages in learning agility to leadership behaviors as rated by others, as well as other personality measures, to make connections."

DR. ALLAN CHURCH

If you could know about someone's level of learning agility, under what condition would that not be important? If I was trying to decide whether to send someone on an international assignment and I could know how quickly that person processed information and how flexible he or she was, that would make a big difference in terms of his or her ability to succeed in that environment. If I was trying to decide who to put in and run this company we just acquired and needed to be integrated into the mother company, I'd want to know if all other things about the candidates were equal. If I could find out that the person I was considering was weak in collaborating, interpersonal risk taking and experimenting, it would influence my decision.

Having some other pieces to the puzzle is why being able to measure learning agility is important.

BURKE: To be able to determine with some reasonable degree of certainty who among an identified population is likely to stand out as an exceptional leader. And, most importantly, quantifying a set of behaviors reliably that furthers research and the quest for all types of validity.

CHAMORRO-PREMUZC: To predict their ability to adapt to changing work demands and perform well in jobs that cannot be properly defined yet.

VANNEST: Learning agility is important to measure because we are seeking to optimize value for the learning leader, for translation into practice and utility, and for sustaining an organization-level benefit.

CHURCH: Although it's not the only indicator of future leadership potential – the Leadership Potential Blue-Print (Church & Silzer 2014[2]; Silzer & Church, 2009[1]) has five others: cognitive skills,

personality disposition, motivation to grow, leadership competencies, and functional expertise – it is a key one and will impact someone's progression and ability to take on bigger roles over time. Learning agility is absolutely one of the key concepts in identifying, developing and accelerating future leadership potential.

How can the Burke Learning Agility Inventory (BLAI) be used to complement other assessment tools?

VANNEST: I facilitate the identification of high-potential leaders as a "placement of bets" on growth and related returns, including readiness for promotion, accelerating success with stretch-learning assignments, or strategic career assignment/pathing.

Educating our decision-making teams on the measurement of learning agility as a way to "increase the probability of bets paying off" will create support in the use of this assessment as a complement to others. The Burke tool helps create a common language for learning agility so decision-making teams can efficiently draw on examples, such as, "Yes, I agree; look at how Jane was comfortable 'actively experimenting' with messaging in this new market to adapt our approach and help our offering achieve name recognition in this market."

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CHAMORRO-PREMUZIC: It seems to have sufficient discriminant and incremental validity over most widely used HR tools. I would use it in addition to more generic personality or ability tests.

BURKE: There is every reason to believe that the uniqueness of the concept of learning agility means that it should complement many other assessment tools. To date, no one has measured this unique behavioral construct satisfactorily. Doing so can provide perhaps a breakthrough in behavioral assessments. That is, demonstrating how a behavioral process of specified learning (speed and flexibility) can affect how well an individual can understand another dimension of his or her personality. For example, a person who scores highly on intuition and on learning agility may be able to gauge more quickly than most others when to think fast and when to go slow, as specified.

CHURCH: I would need to see some real-world examples of the tool used on different people to be confident in my answer here (since I don't really know how well it scores yet). That said, I would expect it to be a nice addition to a MTMM (multi-trait multi-method) assessment and development approach. A practitioner could easily pair it with a 360-feedback tool to explore linkages in learning agility to leadership behaviors as rated by others, as well as other personality measures, to make connections. It could easily be integrated into a developmental assessment suite, leveraged for individual coaching engagements, and implemented large-scale as part of a leadership program focused on learning agility in general.

This begs a question though. Is learning agility meant to be measuring a set of stable traits, or behaviors that can change over time? The field is mixed on learning agility as defined. I wonder what the stance is here. It makes a difference for the type of application (and level of measurement rigor needed as well).

HOFF: I agree with the opinions expressed by the panel members. Anything that can add to our ability to make a better decision is desirable. I think of the complementarity, like a Venn diagram of overlapping circles. The more we can have different tools that give us additional information that increases the size of that center circle, the better. Having multiple measures that confirm and expand one another increases our confidence that we are making the "best" decision.

What answers does the Burke Learning Agility Inventory bring to the assessment/succession/training conversation that have been missing to date?

CHURCH: Well, it brings Warner's model to the marketplace. There are some learning agility tools out there, so at this point it is about having one that stands out (is known) for good reasons. I think it is critical as part of this project that the research and theory foundations of the nine components be clearly detailed. Why is this better than other models or tools?

My suggestion here, whatever you do, is to keep the construct focused and tight. Some of the others have been criticized for not helping advance the field (or the argument about what is and is not learning agility) because they boiled the ocean with their approach. This is a trap. It's much better to have a very well-defined model and tool that has limitations but fits right into a key open slot in the field than one that takes on the leadership models out there.

BURKE: The BLAI provides information on the specific behaviors that should be emphasized when coaching an individual, or a group for that matter, to increase their skills in how to seek feedback; what kinds of risks are likely to lead to learning; and how to collaborate and work with others to create opportunities for learning. The strength of the BLAI is that it is behaviorally based, which means that individual change is more likely than if it were based on the work of Freud.

CHAMORRO-PREMUZIC: It offers a good point of view on the subject, a good definition. It brings order to a chaotic field. Previously, learning agility was most often used as an umbrella concept by a single company to bundle up all the tests and companies it had acquired.

VANNEST: The BLAI provides a view into flexibility that can be discussed in a concrete way and measured, rather than depending on an "artful" integration of personality, competency and experience assessments to form a "history" of flexibility, or on making an educated guess.

HOFF: The BLAI has the potential to add to other tools being used in assessment and selection. The BLAI is a good diagnostic that can be used in the training and develop-

ment area to focus on areas of strength and areas that need development.

What can Warner Burke and EASI · Consult do to complement the work completed to date on the Burke Learning Agility Inventory?

BURKE: We can further the work of testing the BLAI with target groups that are most likely to use the assessment – HR, Organizational Development, Talent Management and related staff within large systems, such as Fortune 500 companies, federal agencies, health care, and larger nonprofits like foundation or charitable organizations. An additional objective, of course, would be to build a variety of norm groups.

VANNEST: I may be taking for granted the past applied research, but it would help to see some application in split-learning groups or a share of high-potentials nominated with/without benefit of this assessment. In addition, I suppose the most direct measure of value will require some longitudinal research that follows the realized growth and career success of identified high-potentials.

CHURCH: We need to have a report that provides (new) insights in an impactful manner. Plus we will need developmental resources, case examples, and the like. And, if the tool is meant to be used as a talent-decision making input,

then we need more validation studies.

What additional research do you recommend be done on the Burke Learning Agility Inventory to improve its usefulness as a predictive tool?

CHURCH: I think we need some studies showing relationships to a variety of other tools so we can see the properties: (1) 360-behavioral ratings; performance ratings over time; turnover; promotion rates, which is key if we are arguing for its predictive powers regarding future potential; personality vis-à-vis the Hogan assessment suite (given the latter's prominence in organizations today); cognitive skills (Raven's Progressive Matrices, others); self-monitoring; and emotional intelligence. (2) Race, ethnicity, age, gender, English language (translations) all need to be tested and normed for adverse impact. I understand this will take time to build but until you have done that, I'd be very cautious about using the words "valid" and "predictive."

BURKE: It's now all about validity; one study after another, large and small, with diverse populations.

CHAMORRO-PREMUZIC: The key is to identify outcomes that are not predicted well by traditional constructs. There should be specific criteria (for example, adapting to a

new country, coping with unexpected circumstances, contributing value beyond expectations) that are better predicted by agility than traditional constructs. In other words, pitch it against existing tests, but in the prediction of non-tradtional outcomes.

HOFF: I am in agreement with everything that has been said. Warner and EASI•Consult are committed to doing this ongoing research. We are offering special pricing on the BLAI for research purposes. Warner and EASI•Consult are putting 10 percent of the revenue generated by the BLAI back into future research.

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What do you see as the improvements and advantages the Burke Learning Agility Inventory brings to other commercially available learning agility measures?

CHAMORRO-PREMUZIC: It is done by serious academics, with credible credentials; it is based on a long and systemat-

ic program of research and truly builds up on existing I-O psychology evidence. This is quite similar to what occurred in the emotional intelligence field. First a non-academic popularized the concept, but then academic research followed up to turn it into a useful tool and concept in I-O psychology.

BURKE: The BLAI is more research-based than any other measure. It has a modest number of items – 38 – along with nine different dimensions.

Therefore, it provides an interesting combination of simple (only 38) and complex (nine ways to analyze the scores with its total). Along with conducting studies that might only focus on one of the nine dimensions, for example, the collaboration dimension is rich with possibilities.

HOFF: I agree with what both Warner and Tomas have said. Learning agility is something that has been of interest to people working in Talent Management for a long time. First we couldn't measure it. Then there were a couple of "measures" out there that

weren't research-based. The breakthrough with the BLAI is that it is based on research. That research will continue and the power of this tool will get stronger and stronger.

How do you see learning agility entering into a succession planning discussion?

VANNEST: I would submit that this is the one, single-most ROI-yielding application. Given the rapidity and nature of change, we should be maximizing our bets on future leadership talent by accounting for learning agility. What I have come to know as a universal truth about succession work over the years is that it's not just about predicting an end-point, such as who gets promoted. You are identifying people for a journey. To achieve ROI, we best figure out whether they are up for the journey. Sojourners, by nature, are sufficiently armed for the inevitable stretch, frustration and failure that come with real learning.

CHURCH: I believe I described this above already, but it would come up either in the long-term context of someone being a high-potential for the future (do they have the learning agility needed?), or with respect to the short-term talent review and staffing discussion (will they learn from this assignment, and what will they learn from this role being discussed?). Again, if this is to be used for talent decisions, it

raises the bar on the quality of data and measurement needed behind it. Based on what is available to date, I think we need more research before it can be used as a decision-making tool. For development-only applications, it is fine.

HOFF: Succession discussions are typically about the combination of performance (what has the person done) and potential (what do we think the person is capable of in the future). We can't bet on everyone, so who do we promote? Allan is right, the research needs to continue to make the test stronger. I also agree with Todd that we are making decisions today using information about personality and leadership style. Collecting BLAI data and having the results be part of the discussion is a way to improve those discussions.

BURKE: There must be evidence from our predictive validity research that BLAI correlates positively with and therefore predicts performance. In addition, although the BLAI would not be the only predictor, it can serve along with other assessments as an important part of a battery of tests to bolster decisions concerning promotion and succession.

CHAMORRO-PREMUZIC: It's complementing data on past performance. If you go with the adage that "what got you here won't take you there," then you need to look at someone's potential, and learning agility can give you that.

One of the debates in Talent Management circles is the choice to either select for skills or train to develop them. What does the discussion look like when we are talking about learning agility?

HOFF: When I was an internal Talent Management person, responsible for selection and training, I would say if I had $1,000 to spend, I would spend $999 on selection and $1 on training. I was trying to be a bit provocative and get folks to do a better job of selection. We are not at the point in our research to make selection decisions using the BLAI. It is a great diagnostic and will have great utility in development discussions. The research will get there related to selection. We are not there today.

CHAMORRO-PREMUZIC: Someone has the skill to be more coachable, so it bridges the gap between the two.

VANNEST: Per my response to related questions here, I have revealed a "bias" for capturing value by selecting for learning

agility. However, that does not limit the use or utility of learning agility in organizations committed to growth through learning.

I spend most of my time designing and delivering learning programs that are highly selective (benefiting from a screening process aimed at both qualifying succession candidates or high-potentials AND determining who among those individuals may benefit the most from our investment in their learning). However, I have delivered many organization-wide programs in the past and work with peers who still do so. In that context, I would value measurable insight on learning agility so that I could "coach" individual participants on how they may get the most from the program. This is the way I approach executive coaching – it is not my role to say "you don't have the right stuff to succeed." Rather, it is my professional obligation to help a leader succeed with some of the strengths they already have … In a learning agility context, that would involve coaching an individual training participant or executive-coaching participant through an approach to explo-

ration, testing and knowledge assimilation that bears fruit for them (like teaching a highly task-oriented and analytical person to develop their first business strategy).

CHURCH: It depends on who you ask. What is Warner's stance? That needs to be clearly articulated in the report and follow-up actions. For me personally, we have learning ability (agility/orientation) as one of two growth dimensions in the Leadership Potential BluePrint.[2]

The growth dimensions are halfway between pure foundational (trait) and competency (state). So we tag learning agility to both, and to life stage a bit as well.

BURKE: The answer to this question is "both – and." The BLAI can help with selection decisions and at the same time provide a focus for skills to develop. In other words, from the set of nine dimensions, you can select the one or two with the lowest scores for a given individual and concentrate on improving that person's behavioral skills in the given dimension or dimensions. Providing a development coach for the individual would likely help with the skill improvement objectives.

How could knowing a manager's learning agility contribute to a coaching engagement?

HOFF: Coaching is a perfect place to use the BLAI. The results of the BLAI help the coach know which of the learning dimensions are easy

for the person being coached to use, and which dimensions he or she finds more difficult. The "coach" and the "coached" can then rehearse situations the coached is going to have to handle. Paying attention to weaker learning dimensions is an added benefit.

BURKE: It could provide a much clearer and specific focus for skill development than having a goal of improving one's emotional intelligence, for example. The more targeted and specific the improvement goal is for both the coach and client, the greater the likelihood that improvement will actually occur.

CHAMORRO-PREMUZIC: Because they will be more trainable.

CHURCH: I think if the tool is positioned as a state/behavioral-based measure and not pure personality, you can easily work on new behaviors. I would recommend putting some of these in the report. If the tool is more stable, then the focus is on work-arounds. But then you also have to contend with personality constructs.

If you could direct the future development of the Burke Learning Agility Inventory, what capabilities would you like it to possess?

BURKE: Strong predictive validity, clear differentiation yet possibilities of overlap as well among the nine dimensions, and tweaking

such things as the labels for the nine dimensions. Future research also will need to focus on context; for example, what kind of culture supports and enhances our attempts to be an agile learner? What other aspects of human behavior and personality relate significantly with one's BLAI scores? For example, there may be thresholds of "prerequisites" for one to score well on learning agility, such as general mental ability, self-awareness and certain facets of motivation needed for achievement. There is definitely an exciting future for deployment of and research on and about learning agility.

VANNEST: Perhaps a complementary inventory which translates the elements in the Burke tool to a learning leader/learning team "mindset indicator." It would help answer the question, "How would an 'agile' leader think and respond in this moment (for example, a strategy meeting, a management team investigating gaps in expected results, a 'crucial conversation' with a struggling direct report)?" In this way, it would become a great real-time teaching tool for facilitating growth and effectiveness of intact leadership teams … or assessing the ability of a high-potential leader to flourish in assigned committee work, as a growth assignment.

CHAMORRO-PREMUZIC: More incremental validity studies.

HOFF: I want to see further research in the area of selection. There may be some relationships between learning dimensions or clusters of

dimensions. The relationship between learning dimensions and personality should be explored.

CHURCH: Does learning agility as defined by [Burke] change? If so, how? If so, when should a person retake this instrument? Will it be sensitive enough to pick up change or not? How does the BLAI correlate with personality factors?

Footnotes:

1. Rob Silzer and Allan H. Church, The Potential for Potential, Industrial and Organizational Psychology, Volume 2, Issue 4, pages 446–452, December 2009

2. Allan H. Church and Rob Silzer, Going behind the Corporate Curtain with a BluePrint for Leadership Potential, HR People and Strategy, Volume 36, Issue 4, pages 50-58, January 2014

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