

Unlocking Potential:

# UNDERSTANDING AND APPLYING TOOLS TO IDENTIFY AND DEVELOP LEARNING AGILITY

By George S. Hallenbeck Jr., Ph.D.

## A USAGE GUIDE

### Key Takeaways:

- Identifying and developing learning agility is critical to building a strong pipeline of leadership talent
- Choices Architect<sup>®</sup>, a validated measure of learning agility, can be administered in a variety of formats and is applicable to both succession planning and leadership development initiatives
- Seven distinct types of learning agility are frequently observed
- Individuals have many options to choose from, both part- and full-time experiences, to develop their learning agility

### WHO WILL BE OUR FUTURE LEADERS?

This question is increasingly on executives' minds. As a result, organizations have devoted increased resources in recent years to identifying and developing a strong pipeline of talent. Talent that has the potential to move through the ranks, tackle complex and significant challenges, and lead the organization in new directions.

An essential element of building a strong talent pipeline is to identify employees who have demonstrated both sustained high performance and also high potential. Senior leaders often equate performance and potential, but studies show that only one-third of high-performing employees are also high in potential. The remaining individuals are indeed valuable contributors to the organization but tend to perform best within a particular area of expertise and are not adaptable to a wide range of challenges.

#### Using Learning Agility to Measure Potential

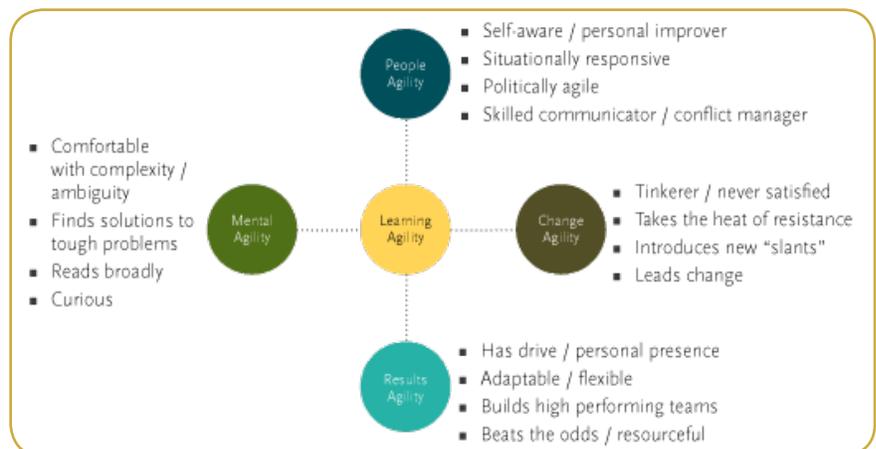
To address their long-term talent needs, organizations must have a clear concept of potential and have reliable ways of measuring and developing it. Our research has firmly established that one of the strongest differentiators of potential is learning agility.

Learning agility is the ability to learn from experience and subsequently apply that learning to perform successfully under challenging, first-time conditions. Individuals higher in learning agility are significantly more successful *after* they are promoted than others.

This Usage Guide will orient you to an integrated suite of tools that will help your organization unlock its potential and build a strong cadre of future leaders. Specific tools for identifying and developing learning agility will be discussed and tips will be offered to most effectively implement those tools in your organization.

## Identifying Learning Agility

Choices Architect® is a validated measure of learning agility. The 81 items in Choices Architect® measure four distinct factors of learning agility: Mental Agility, People Agility, Change Agility, and Results Agility. The four factors break down into 27 separate dimensions that provide greater insight into an individual's relative strengths and developmental needs.



Choices Architect® is most often applied in the context of succession planning to validate perceptions of an individual's potential. It can be applied in other ways, including for developmental purposes, which we will discuss below.



Choices Architect® comes in various formats—online survey, paper-based questionnaire, and sort cards. This provides the user flexibility in terms of how best to apply the measure. Each approach offers distinct advantages and lends itself to particular applications. We will provide a brief overview of each format and discuss when and how it might best be applied.

### The eChoices™ Online Survey – Useful for Evaluating Learning Agility Around the Globe

The electronic version of Choices Architect®—the eChoices™ Online Survey—is ideal for use when more than a dozen or so individuals are going to be evaluated in terms of their learning agility and/or when raters are participating from multiple locations. The survey is easily administered through Lominger International's Global Survey Center, and reports are available in both paper and electronic formats.

Recent research has shown that rating patterns for learning agility are quite consistent across different global regions, supporting our view that learning agility is a quality that is normally distributed throughout the population and doesn't differ along lines such as age, gender, or level in the organization. Learning agility, it seems, can be found just about anywhere.

To support your organization's efforts to search broadly for learning agility, we have recently expanded the number of languages in which the survey is available. The current list includes Spanish, French, German, Italian, Brazilian Portuguese, Simplified Chinese, and Japanese.

The survey is delivered to all raters in the same format (81 randomized items) and takes about 15–20 minutes to complete. E-mail invitations to raters can be customized to inform them about the organization's purpose for conducting the survey and to provide specific instructions.

The Global Survey Center will work with you to:

- Confirm rater assignments.
- Provide status completion reports.
- Issue reminders and process reports in a timely manner.

Reports come in a choice of two basic formats: a “short report,” commonly used for succession planning purposes and a “long report,” typically used for development purposes.

**The eChoices™ Online Survey “Short Report” Format.** This report provides the necessary information that talent managers and organizational leaders need to assess whether an individual meets the criteria for having high levels of learning agility and should be designated as having high potential. The report highlights an individual's overall learning agility score and how it ranks compared to our norms and also provides scores on the four learning agility factors and 27 dimensions.

The raters for the short report are generally the individuals directly involved in and responsible for making talent decisions for the organization or a particular business unit. Raters typically include the individual's boss, the boss's boss, and someone in a senior talent management role. The individual being rated is typically not included as a self-rater and in some instances may be unaware that he or she is being rated.

**Recent research has shown that rating patterns for learning agility are quite consistent across different global regions...**



**CHOICES® ARCHITECT®  
Multi-Rater Report**

**Factor Summary**

RANK	FACTORS	MEAN	Rating Scale					Unrated Items	Lominger Norm Average	Norm Percentile
			1 Not At All Like This	2 Less Often Than Most	3 About Like Most People	4 Better / More Often Than Most	5 The Clearest Example of This			
1.0	Factor IV: Results Agility	4.25						2%	3.50	90
2.0	Factor I: Mental Agility	3.87						5%	3.33	84-86
3.0	Factor III: Change Agility	3.85						5%	3.33	78-81
4.0	Factor II: People Agility	3.79						2%	3.36	81

Excluding self as a rater is strongly recommended for two reasons:

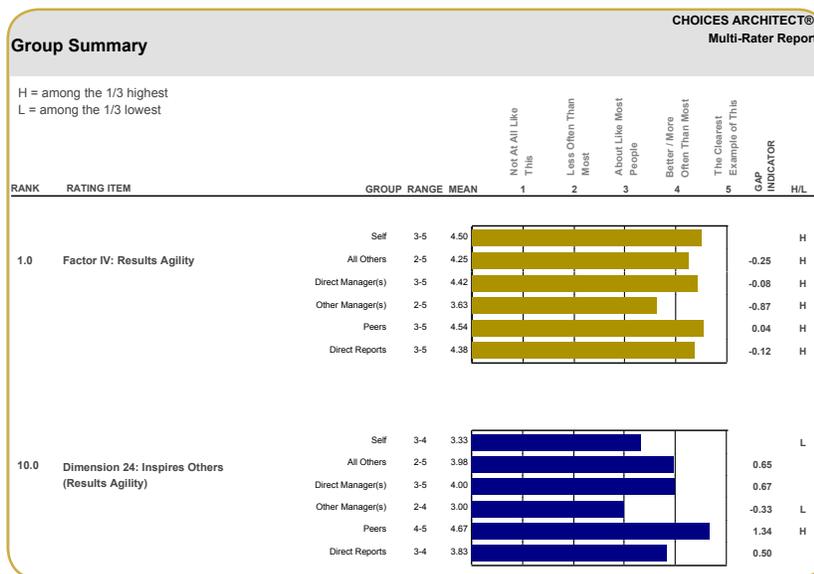
1. Our best practices support keeping the succession planning process a private one, at least until the organization has established a highly refined and successful talent review process. Transparency, while well-intentioned, can lead to difficulties, particularly when individuals feel excluded or passed over.
2. Research consistently shows that individuals are not effective at rating themselves on Choices Architect® — individuals rated low by others typically overrate themselves, while the opposite is true of individuals rated high by others in learning agility. These discrepancies can lead to awkwardness, even conflict, especially when individuals perceive their learning agility to be much higher than others see it.

**The long report format is ideal when the organization wants to rate someone's learning agility purely for developmental purposes.**

**The eChoices™ Online Survey “Long Report” Format.** The long report format is ideal when the organization wants to rate someone's learning agility purely for developmental purposes. This may occur at the point where someone has already been confirmed by the organization as a high potential or when the individual is working in a role that has a high demand for learning agility in order to be successful.

Rater selection for the long report differs from the short report. Typically, the rater list is expanded to include not only the boss and other senior-level raters, but also peers and direct reports. In this case, the individual

being rated is usually involved as a self-rater. The combination of multiple, diverse raters and comparison between self and other ratings gives the individual an experience more typical of a 360° feedback survey and facilitates awareness and development.



The eChoices™ Online Survey long report includes the same content as the short report, plus two additional sections:

- An item report that features a rank-ordered list of scores on each of the 81 survey items.
- A summary report that provides a breakdown of ratings from each rating group for every item, dimension, and factor and highlights self-other rating differences.



### Choices Architect® Quick Score Questionnaire – Ideal When You Need Instant Scoring

The Quick Score format provides a paper-based alternative to the electronic survey and is ideal when a limited number of surveys are being delivered or when instant scoring is required.

Each Quick Score Questionnaire:

- Is designed to be completed by a single rater. (Completed questionnaires can be gathered and quickly scored by accessing the built-in scoring feature.)

- Yields precise overall learning agility and factor scores.
- Provides dimension-level results that can be interpreted visually.

In a succession planning setting, the raters could do a simultaneous rating and scoring of an individual and then immediately discuss the results. In a coaching and development setting, the coach and learner could each fill out the questionnaire, score, compare results, and share their insights.

### **Choices Architect® Sort Card Deck and Quick Reference Guide – A Hands-On Approach for Assessing Learning Agility**

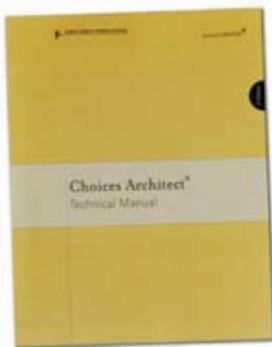


Choices Architect® Sort Cards can be used for the same purposes as the electronic and paper surveys. The only difference is the methodology—raters sort individual item cards and complete the scoring process using a system of scoring sheets.

The sort cards also provide applications that the electronic and paper-based tools do not. In particular, cards can be sorted using what is called a “flat sort” methodology that evenly divides items into categories. Instead of yielding a specific score, a flat sort offers a comparison of the relative strength or importance of different dimensions or factors. This is very useful when comparing the relative strengths of team members or trying to determine which dimensions or factors of learning agility are most important for a particular job role.

An accompanying manual, the *Choices Architect® Quick Reference Guide*, provides specific guidelines for conducting a variety of card sorts. The highlighted applications include:

- Assessing Potential
- Selecting People for Developmental Assignments
- Assessing Teams
- Assessing Development Needs of High Potentials
- Profiling Jobs, Situations, or Tasks



### **Choices Architect® Technical Manual – Documents the Research Foundation for Learning Agility**

The *Choices Architect® Technical Manual* provides insight into the research underpinnings for Choices Architect®. The manual includes

overviews of validation studies, a summary of research findings, percentile charts, references, and FAQ responses. This manual is essential for individuals who are responsible for being subject-matter experts for the application of Choices Architect® in their organization as well as for those who are undertaking their own applied research efforts using the instrument.

### **Getting Started with Choices Architect®**

Choices Architect® is a restricted set of tools, meaning that certification is required from Korn/Ferry Leadership and Talent Consulting to administer and interpret the survey results and provide feedback. Public and in-house certifications are readily available that cover the research basis for Choices Architect®, review the purpose of each tool, and provide recommendations and practice in applying them.

Following certification, the Choices Architect® tools can be purchased directly from Lominger International and applied by certified practitioners. In the case of the eChoices™ Online Survey, the Global Survey Center will guide you through a one-time client set up process and then work with you to launch and administer subsequent survey engagements.

### **Tips for Using Choices Architect®**

Before applying Choices Architect®, it is very important to define the specific purpose for which the tool will be applied, who will be rated, who will conduct ratings, the specific method to be used, and how the process will unfold. A pre- and post-implementation communication plan is also essential.

There are many correct ways to implement Choices Architect® depending on the particular purpose, the people involved, and how the evaluation of learning agility relates to other talent management efforts. Every situation presents a unique set of implementation considerations. However, there are two practices we consistently recommend as part of any Choices Architect® implementation, particularly in the early stages:

1. Make sure you have spent sufficient time orienting key stakeholders to what learning agility is and why it is important. Typically, a two-hour interactive workshop with senior managers that might incorporate a sample card sort or an overview of an eChoices™ Online Survey report is a good way to get started. The sooner a person understands what learning agility looks like

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**Every situation presents a unique set of implementation considerations.**

**The sooner a person understands what learning agility looks like in behavioral terms and how it is critical to the organization's talent management efforts, the better positioned he or she will be to deliver valid ratings and make informed decisions using the tool.**

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2. Avoid the temptation to roll out Choices Architect® on a grand scale. Instead, pick a target population for a pilot run. This approach helps ensure you are applying the tool in the manner you intended, resolves any questions you might have, and makes any necessary adjustments to the process before going forward. Resources from Korn/Ferry Leadership and Talent Consulting can assist you and help guide your efforts during this initial phase.

### **Acquiring a Choices Architect® Intellectual Property License**

After applying Choices Architect® for a period of time, many organizations show an interest in taking some of the language related to learning agility and embedding it into other aspects of their talent management operations and/or making some modifications to the content to fit their particular needs.

To facilitate this process, we provide our clients with the opportunity to acquire an intellectual property license. This gives you the freedom and flexibility to apply the Choices Architect® content in a way that best fits your needs and seamlessly blends it into your practices. If you are interested in finding out more about an intellectual property license, contact our licensing department at [licensing@kornferry.com](mailto:licensing@kornferry.com).

### **Frequently Asked Questions**

We have included some of the most commonly asked questions about our Choices Architect® tools and the process of measuring learning agility. If you have more questions, you may want to contact us at [customerservice@kornferry.com](mailto:customerservice@kornferry.com) or by calling +1 877-345-3610 (US/Canada) or +1 952-345-3610 (International).

1. *What if someone I consider to be a high potential doesn't score high in learning agility?*

This may mean that your initial evaluation of the individual's potential was not accurate. This should not be a disappointing result since the very nature of the tool is to help you validate your perceptions of potential and make sure that valued employees

are not being put on a career path that will not benefit either them or the organization.

In the case where someone scores in the high average range of learning agility, but not in the upper percentiles, then this provides a good opportunity to construct a development plan that will target opportunities for enhancing his or her learning agility.

*2. What if raters differ in their perceptions of an individual's learning agility?*

This will happen on occasion, and it is worthwhile to engage in a facilitated discussion where the different parties can provide their perceptions and make comparisons. It is not necessary to reach consensus, but often an exchange of views can cause one or more of the raters to gain additional perspective.

*3. Can I rate a high-potential candidate on the competencies most closely linked to learning agility as a substitute measure for Choices Architect®?*

This is an appealing idea, but it does not work quite as well in practice. First of all, the competencies are differentially weighted in their relationship to learning agility, so this makes scoring very difficult. Second, there are over 25 separate competencies with links to learning agility. Creating a comprehensive measure and gathering and integrating the data in this way takes as much, if not more, effort as it would to administer Choices Architect®. Finally, attempting to assess learning agility via related competencies would likely need to be done using the VOICES® survey. VOICES® is a competency-based developmental feedback instrument, and is not designed as a learning agility assessment. Applying VOICES® in this manner could lead to confusion and other complications.

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*4. Can I do a shortened version of Choices Architect®, using just the items I want to include?*

Choices Architect® results not based on the complete 81-item survey are not considered valid, and it is not advised to base any decisions regarding potential or advancement on incomplete scores. Also, measuring just a portion of learning agility, say one or two factors, provides an incomplete view since it is a very complex construct.



### ***Learning from Experience*™ – An Alternate Means of Assessing Learning Agility**

In addition to Choices Architect®, the *Learning from Experience*™ (*LFE*) Interview Guide provides an alternate means for assessing learning agility. A structured, behavior-based interview approach provides specific questions for assessing each of the four factors of learning agility.

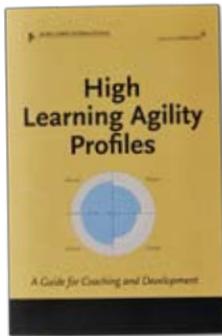
*LFE* has an added advantage in that it can be applied to external selection. Choices Architect® requires raters to be well-acquainted with the person being rated in order to yield valid results. *LFE*, on the other hand, can be applied successfully when the person being interviewed is not familiar or well-known.

*LFE* is an excellent complement to the results from a Choices Architect® survey as it provides both validation and a deeper insight into the specific ways an individual applies and leverages his or her learning agility. This lends value in both succession planning and development applications.

### **Developing Learning Agility**

Identifying learning agility is just the start. Potential is not static in nature. A high potential today is not necessarily a high potential tomorrow. Without new challenges and experiences to inform learning and new opportunities to apply those lessons learned, learning agility can grow stale. Also, even individuals who are high in learning agility may have lower scores in several dimensions. Therefore, continuing to nurture and reinforce learning agility is a high priority.

Two specific resources are available to support and enhance efforts at developing learning agility: High Learning Agility Profiles and *FYI for Learning Agility*™.



### **High Learning Agility Profiles – Highlights Seven Distinct Types of Learning Agility**

Learning agility is a complex set of characteristics. Therefore, it is not surprising that learning agile people, while sharing some common traits, also tend to differ in terms of their specific learning agility strengths and weaknesses. Recent research has revealed that there are seven distinct types of high learning agile people that are frequently observed. Understanding an individual's particular learning agility profile has implications for determining how to best deploy and develop that person's talents.

### High Learning Agility Profiles:

- Provide an overview of each of the seven profiles, highlighting their unique nature and underscoring the impact that people who fit that profile can have on the organization. Individuals can identify which of the seven profiles best fit them. They are also prompted to consider the situations that favor their learning agility strengths as well as what situations will provide the best opportunities for developing their learning agility.
- Work best when the individual has the results from a recent Choices Architect® survey and the opportunity to work with a coach who is knowledgeable about learning agility.
- Can be incorporated into a Choices Architect® feedback session or as part of a follow-up coaching discussion.
- Can be used in the context of succession planning to extend the discussion about what are the best next steps for a high potential and can help to differentiate that person from other high potentials.
- Can be used when several learning agile people are working together in a team setting. By understanding their own profile and the profiles of their team members, individuals can gain better insight into their specific contribution to the team as well as how to best leverage their peers' talents.

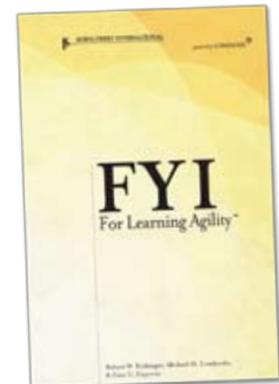
***FYI for Learning Agility™*** is a valuable resource for formulating detailed next steps and allows the learning agile person and his or her coach to focus deeper on how to develop specific dimensions of learning agility.

### ***FYI for Learning Agility™*** – Provides Key Remedies for Developing Learning Agility

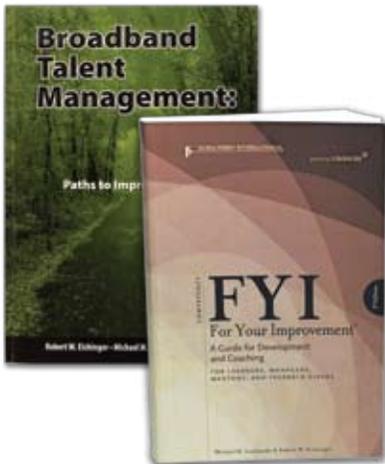
While the High Learning Agility Profiles tool provides an overall framework for looking at an individual's learning agility and what that might mean for his or her career, *FYI for Learning Agility™* is a valuable resource for formulating detailed next steps and allows the learning agile person and his or her coach to focus deeper on how to develop specific dimensions of learning agility.

#### *FYI for Learning Agility™*:

- Is designed for any motivated person seeking to develop skills that lead to increased learning agility. The suggestions provided are aimed at gaining insight on learning strengths and remedying skill needs. The content will also help anyone who is serving as a manager, mentor, or feedback giver.



- Is divided into 27 chapters—one for each dimension of learning agility. Each chapter includes a detailed definition of the dimension, 10 practical, easy-to-implement tips for development, part-time and full-time job assignments that provide good opportunities for developing in the dimension, and a list of suggested readings.
- Plays an important role in coaching individuals, but it can also be applied to formulating development strategies based on aggregate Choices Architect® results for a group of high potentials.
- Is also an excellent all-purpose resource for understanding each dimension of learning agility in greater detail. The more a coach or talent manager understands the nuances of learning agility, the better he or she is positioned to spot learning agile characteristics in others and determine the best course of action.



### Acquiring an *FYI for Learning Agility*™ Intellectual Property License

As with Choices Architect®, the content from *FYI for Learning Agility*™ is available for licensing so that it can be customized and embedded into an organization’s solutions. For example, specific development suggestions can be incorporated into the development planning materials for the organization’s high potential coaching program. Similarly, job assignments most effective for developing particular dimensions or factors of learning agility can be highlighted as part of the “next steps” discussion in the organization’s talent review process. If you are interested in finding out more about an intellectual property license, contact our licensing department at [licensing@kornferry.com](mailto:licensing@kornferry.com).

### Additional Development Resources – *Broadband Talent Management*™ and *FYI For Your Improvement*™

Additional resources are available to support ongoing development efforts with high potentials. Depending on the particular nature of the individual’s development needs, *Broadband Talent Management*™ and the companion *Paths to Improvement: A Coaching Reference Guide for Broadband Talent Management*™ provide an array of strategies to choose from for pursuing development. These include direct approaches like a Good to Great Plan or employing more creative approaches like a Workaround Plan or a Marketing Plan.

*FYI For Your Improvement*™ incorporates many of the same features as *FYI for Learning Agility*™ and provides remedies for each of the 67 Leadership Architect® Competencies (as well as the 19 Career Stoppers and Stoppers). Each chapter in *FYI for Learning Agility*™ provides a list of Leadership Architect® Competencies that are closely linked (Strong, Moderate, or Light) to each dimension of learning agility. This allows for simultaneous development by targeting the specific competencies that support a learning agility dimension.

### **Tips for Developing Learning Agility**

Any effort at development, whether it is aimed at learning agility or competencies, will not be as successful unless the individual being coached is aware that he or she has a need, accepts that need, and is motivated to do something about it. Adhering to best practices when delivering feedback and taking the time to work through any defensiveness or blind spots that the individual has is key to this effort.

Also, treat each individual's set of development needs and corresponding solutions as unique. While it is good to have some reliable solutions to apply and an idea of what has tended to work well in the past, make sure to approach each situation with a fresh perspective and involve the individual in crafting a set of development strategies that best suits his or her needs.

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### **Frequently Asked Questions**

We have included some of the most commonly asked questions about developing learning agility in individuals. If you have more questions, you may want to contact us at [customerservice@kornferry.com](mailto:customerservice@kornferry.com) or by calling +1 877-345-3610 (US/Canada) or +1 952-345-3610 (International).

*1. Are some aspects of learning agility more difficult to develop than others?*

Yes. Each individual dimension has a level of developmental difficulty associated with it (these are listed in *FYI for Learning Agility*™) and the levels range from Easy to Hard. If you aggregate developmental difficulty across the four learning agility factors, People Agility and Change Agility emerge as the most difficult to develop and Results Agility is the easiest.

**There is not a “one best experience” for developing learning agility overall or even for a particular dimension or factor. Generally, there are many options to choose from, both part-time and full-time experiences.**

*2. How long does it take to develop learning agility?*

This depends both on how much development needs to take place and how difficult a particular dimension is to develop. In general, learning agility is not something that is developed quickly or easily, in part because experience itself plays a critical role. As a rule of thumb, allow nine months or so for a particular job experience to yield some substantive lessons and roughly an equal amount of time to gain experience with applying those lessons to new challenges.

*3. How much can I expect to develop my learning agility?*

This depends on where you are now in terms of your skill level and how far you are looking to progress. If you were to give yourself the equivalent of a letter grade in learning agility, it is reasonable that you might be able to move up one letter grade in skill over time. In general, the further advanced you already are in your learning agility, the better your prospects for continued development, in part because you show a strong tendency towards growth and adaptability. Put another way, someone who is a high performer but low in learning agility is not likely to transform into a true high potential. It is better to emphasize continued growth in the areas where he or she already demonstrates some comfort and expertise.

*4. What are the best experiences for developing learning agility?*

There is not a “one best experience” for developing learning agility overall or even for a particular dimension or factor. Generally, there are many options to choose from, both part-time and full-time experiences. FYI for Learning Agility™ highlights a number of specific experiences that provide good opportunities for development for each learning agility dimension. The determination of which experience might provide the best opportunity should be a decision between the individual looking to develop and his or her coach.

### **Getting the Most out of Learning Agility in Your Organization**

Our intent with this Usage Guide is to provide you with an informative overview of the tools available for identifying and developing learning agility in your organization. Applied correctly, they will help to unlock the sources of potential in your organization and establish a strong and enduring pipeline of future leaders.



The key lies in having a clear purpose and plan for applying the tools and being learning agile in your approach to applying them. Continually seek feedback on your efforts to incorporate the tools into your talent management efforts, be open to the lessons learned, seize opportunities to apply them, and continually experiment with new and refined approaches.

Finally, take steps to establish an organizational culture and environment that nurtures and reinforces learning. A learning culture encourages employees to share information, provide feedback to each other, and try innovative solutions. The development of employees' learning agility doesn't happen coincidentally. Learning and development is less likely to occur when the organization environment does not support it. A learning culture starts at the top with leaders who truly respect the value of learning and are willing to demonstrate that respect and set an example for others through their actions.

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**George Hallenbeck**, Ph.D., is Director, Intellectual Property Development with Korn/Ferry Leadership and Talent Consulting.

### **About Korn/Ferry International**

Korn/Ferry International, with more than 90 offices in 39 countries, is a premier global provider of talent management solutions. Based in Los Angeles, the firm delivers an array of solutions that help clients to identify, deploy, develop, retain and reward their talent.

For more information on learning agility and the tools highlighted in this Usage Guide, please visit our Web site at [www.lominger.com](http://www.lominger.com) or contact Customer Service at [customerservice@kornferry.com](mailto:customerservice@kornferry.com) or by calling +1 877-345-3610 (US/Canada) or +1 952-345-3610 (International).